



Passport

Experiential Luxury in Germany

Euromonitor International

October 2023

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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EXPERIENTIAL LUXURY IN GERMANY - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Current Value Sales Rising Again In Experiential Luxury In 2023

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Luxury Hotels Records Highest Value Growth Within Category Overall In 2023

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Althoff Hotels GmbH Leads Experiential Luxury In 2022

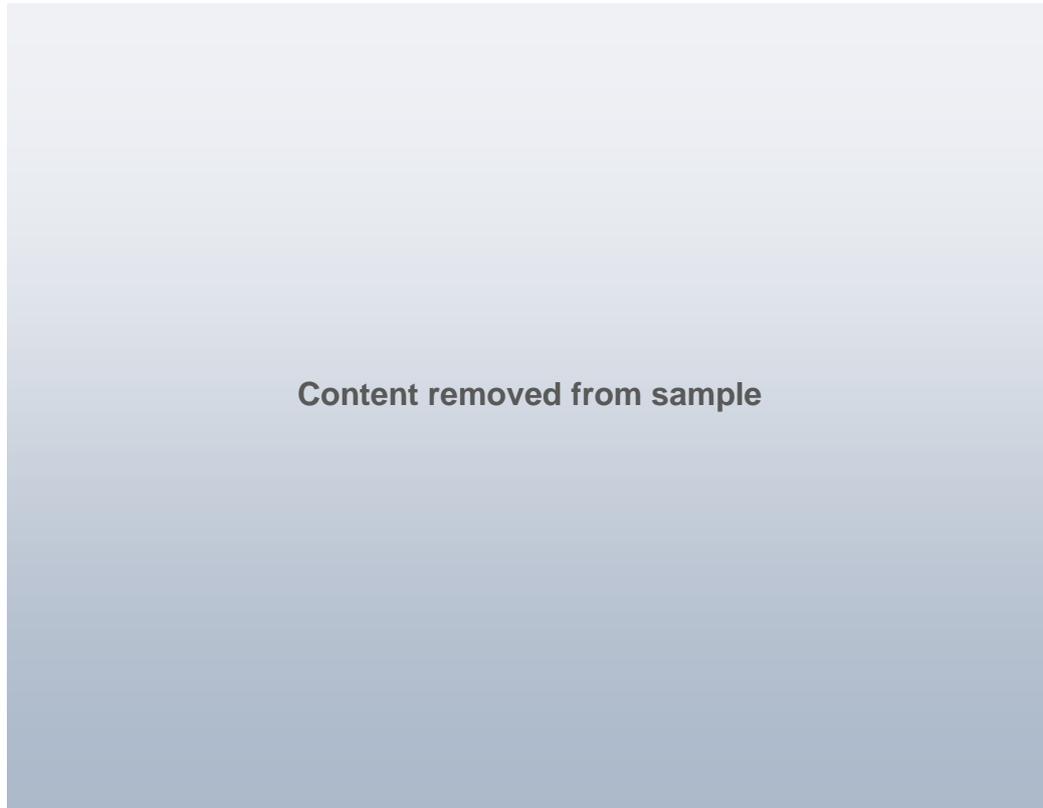
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PROSPECTS AND OPPORTUNITIES

Retail Value Sales Look Set To Increase Over The Forecast Period

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Luxury Hotels Is Expected To See The Most Dynamic Performance Over The Forecast Period



CATEGORY DATA

Table 1 Sales of Experiential Luxury by Category: Value 2018-2023

EUR million	2018	2019	2020	2021	2022	2023
Luxury Foodservice	Data removed from sample					
Luxury Hotels						
Experiential Luxury						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Experiential Luxury by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Luxury Foodservice	Data removed from sample		
Luxury Hotels			
Experiential Luxury			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

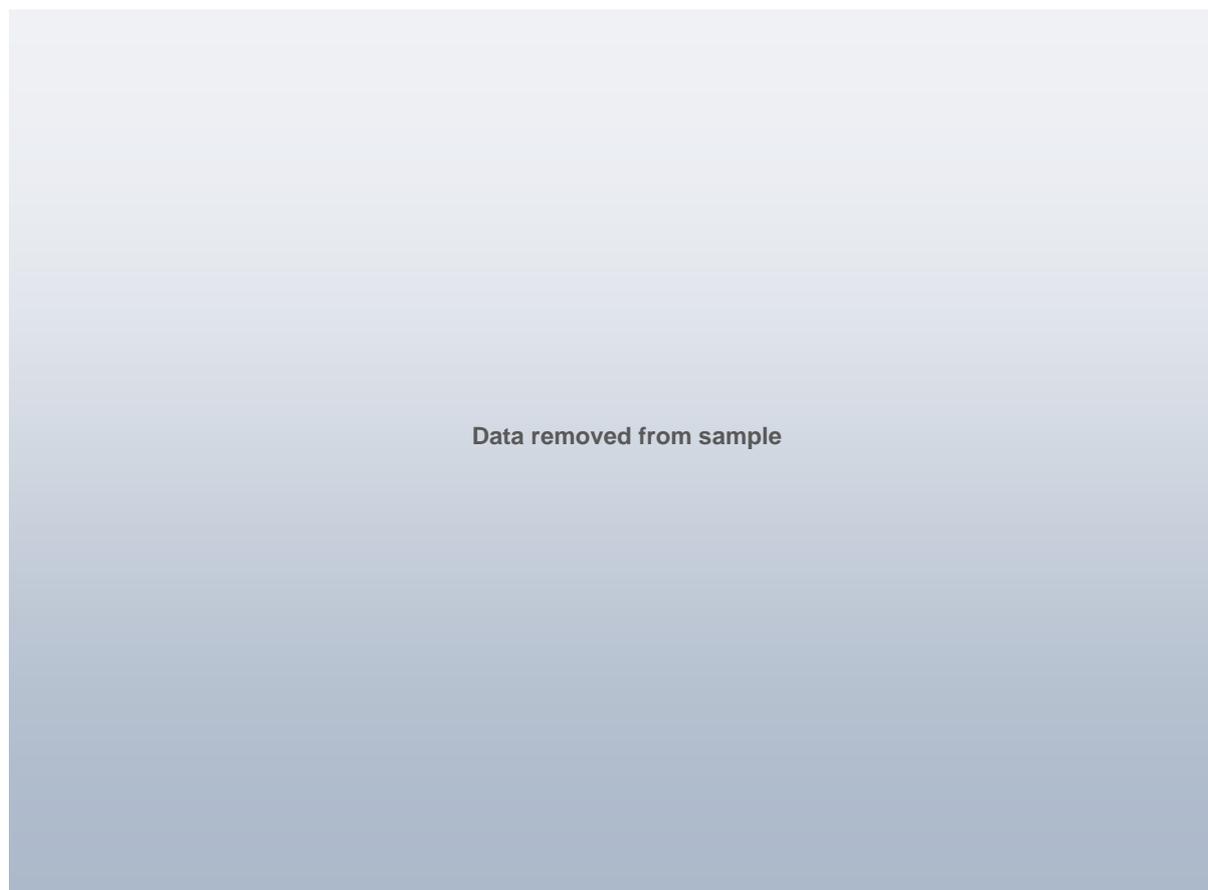
Table 3 NBO Company Shares of Experiential Luxury: % Value 2018-2023

% retail value rsp Company	2018	2019	2020	2021	2022
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Experiential Luxury: % Value 2019-2022

% retail value rsp Brand (GBO)	Company (NBO)	2019	2020	2021	2022
Data removed from sample					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Forecast Sales of Experiential Luxury by Category: Value 2023-2028

EUR million	2023	2024	2025	2026	2027	2028
Luxury Foodservice	Data removed from sample					
Luxury Hotels						
Experiential Luxury						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Forecast Sales of Experiential Luxury by Category: % Value Growth 2023-2028

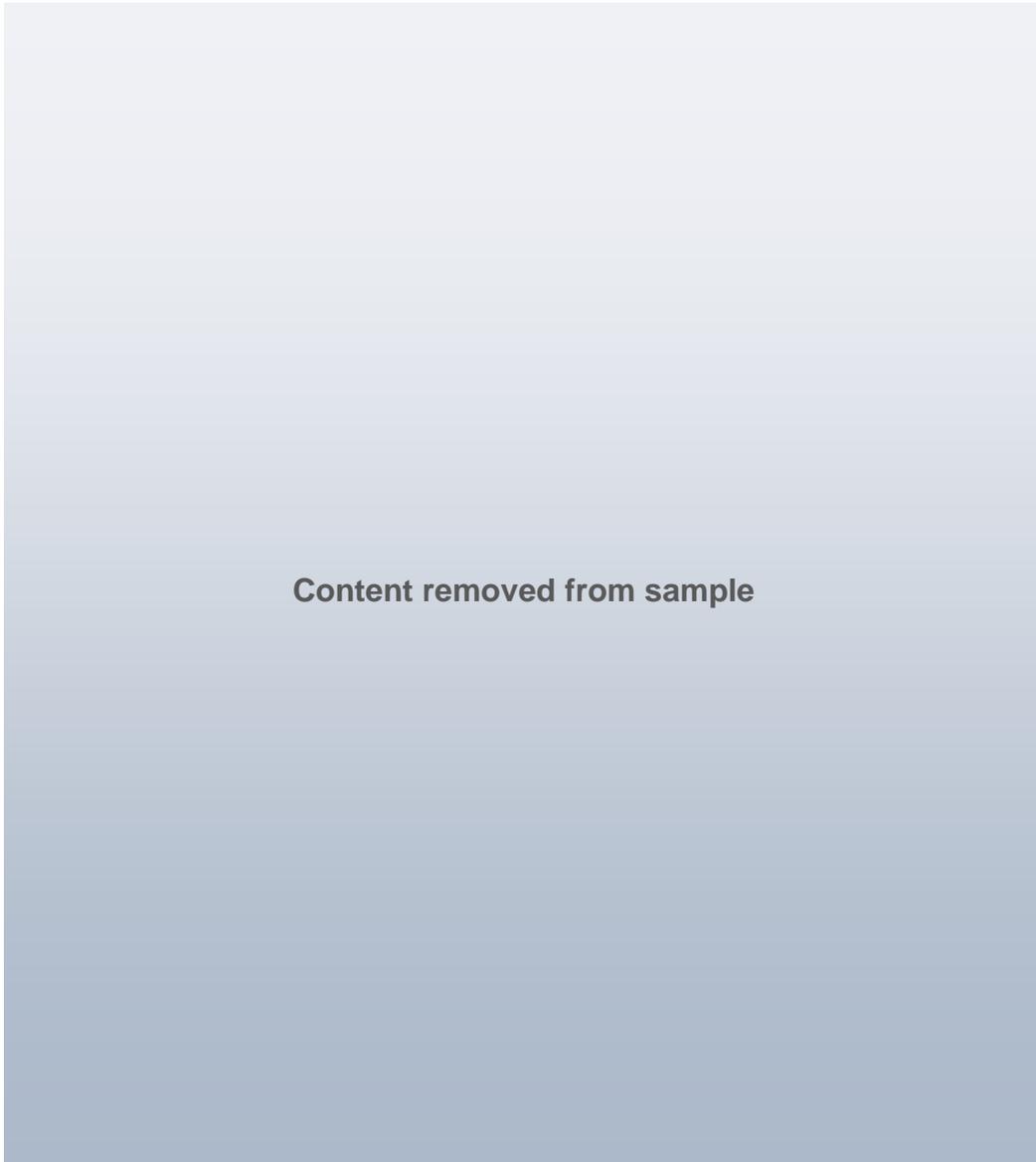
% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Luxury Foodservice	Data removed from sample		
Luxury Hotels			
Experiential Luxury			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

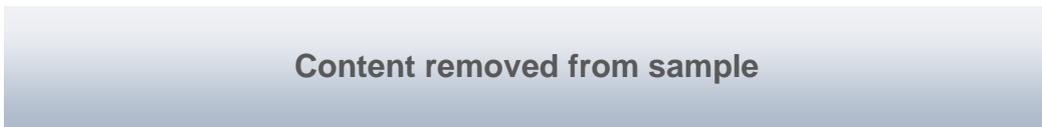
LUXURY GOODS IN GERMANY - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Luxury Goods In 2023: The Big Picture



2023 Key Trends



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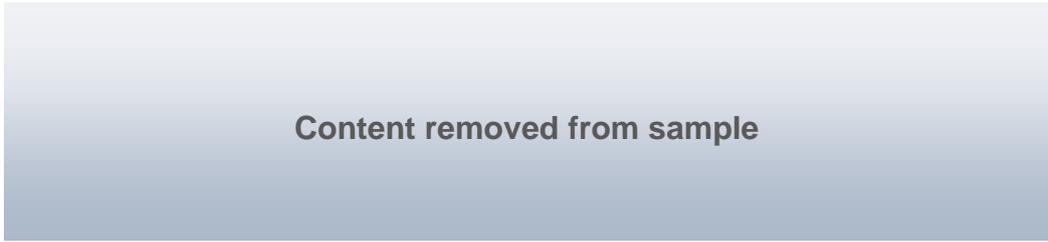
Competitive Landscape

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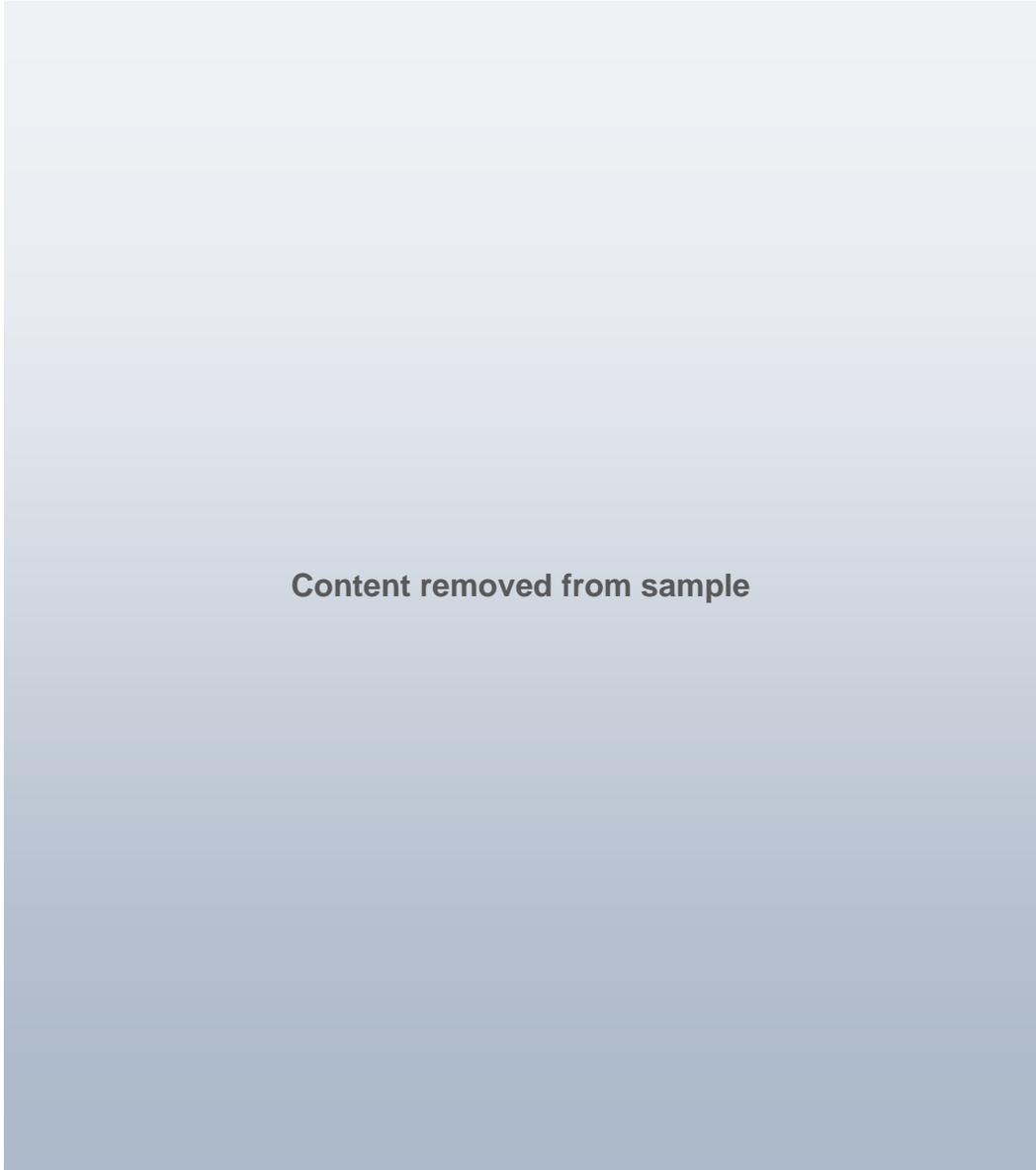
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Retailing Developments

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What Next For Luxury Goods?



MARKET DATA

Table 7 Sales of Luxury Goods by Category: Value 2018-2023

EUR million	2018	2019	2020	2021	2022	2023
Luxury Foodservice	Data removed from sample					
Luxury Hotels						
Experiential Luxury						
Fine Wines						
Luxury Spirits						
Fine Wines/Champagne and Spirits						
Premium and Luxury Cars						
Designer Apparel and Footwear (Ready-to-Wear)						
Luxury Eyewear						
Luxury Jewellery						
Luxury Leather Goods						
Luxury Wearables						
Electronics						
Luxury Timepieces						
Luxury Writing Instruments and Stationery						
Super Premium Beauty and Personal Care						
Personal Luxury						
Luxury Goods						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Luxury Goods by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Luxury Foodservice	Data removed from sample		
Luxury Hotels			
Experiential Luxury			
Fine Wines			
Luxury Spirits			
Fine Wines/Champagne and Spirits			
Premium and Luxury Cars			
Designer Apparel and Footwear (Ready-to-Wear)			
Luxury Eyewear			
Luxury Jewellery			
Luxury Leather Goods			
Luxury Wearables Electronics			
Luxury Timepieces			
Luxury Writing Instruments and Stationery			
Super Premium Beauty and Personal Care			
Personal Luxury			
Luxury Goods			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Inbound Receipts for Luxury Goods by Country of Origin: Value 2018-2023

EUR Million

	2018	2019	2020	2021	2022	2023
Brazil	Data removed from sample					
China						
France						
GCC Countries						
Germany						
Japan						
Russia						
South Korea						
United Kingdom						
US						
Other						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 NBO Company Shares of Luxury Goods: % Value 2018-2023

% retail value rsp Company	2018	2019	2020	2021	2022	2023
Data removed from sample						

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

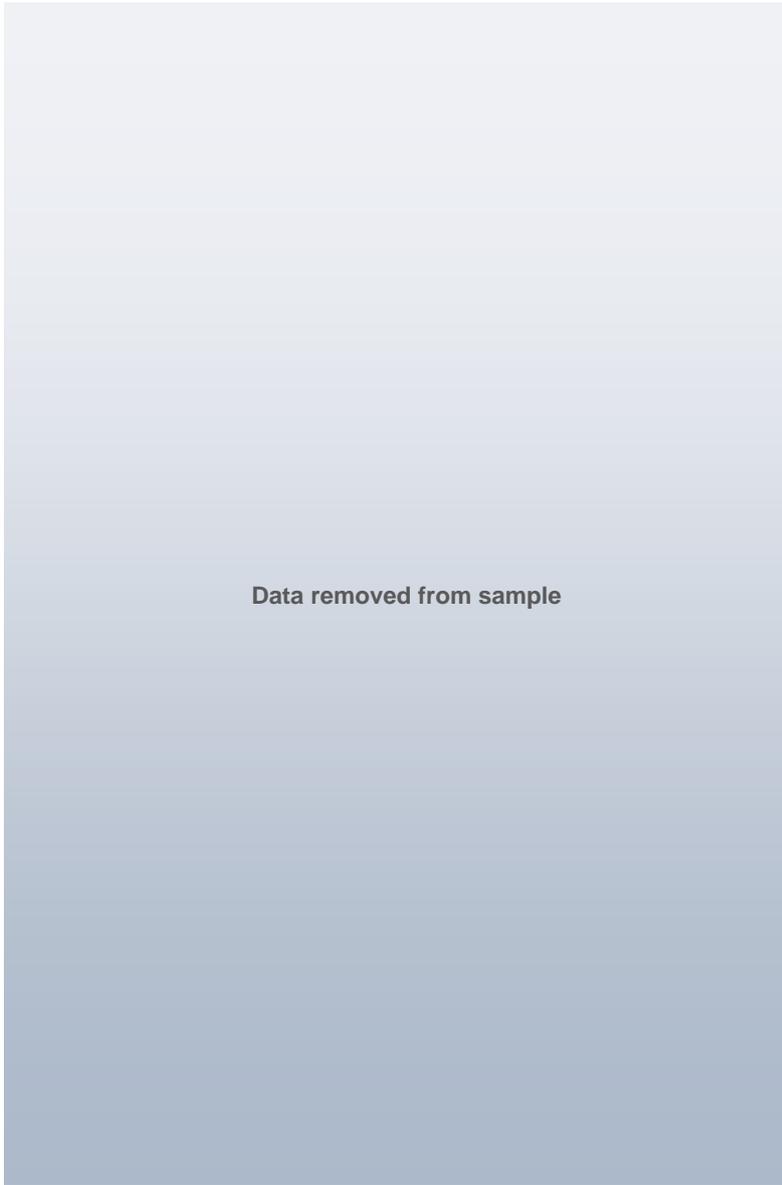
Table 11 LBN Brand Shares of Luxury Goods: % Value 2019-2023

% retail value rsp Brand (GBO)	Company (NBO)	2019	2020	2021	2022
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Brand (GBO)	Company (NBO)	2023
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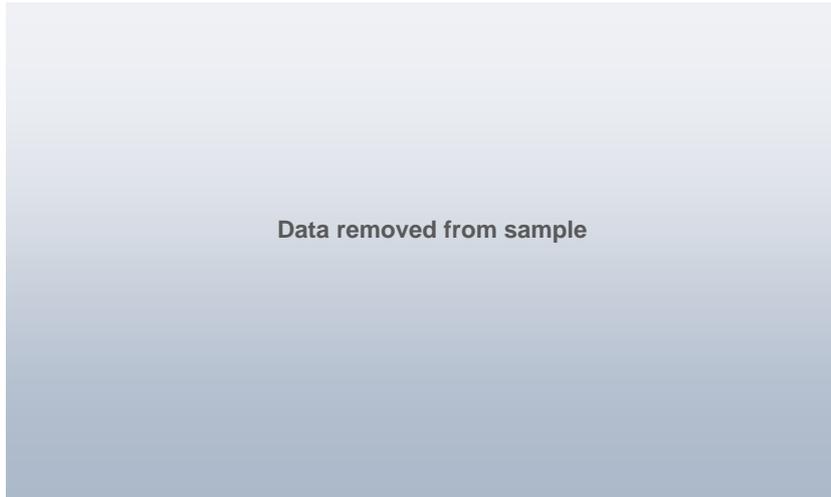
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 **Distribution of Luxury Goods by Format and Category: % Value 2023**

% retail value rsp

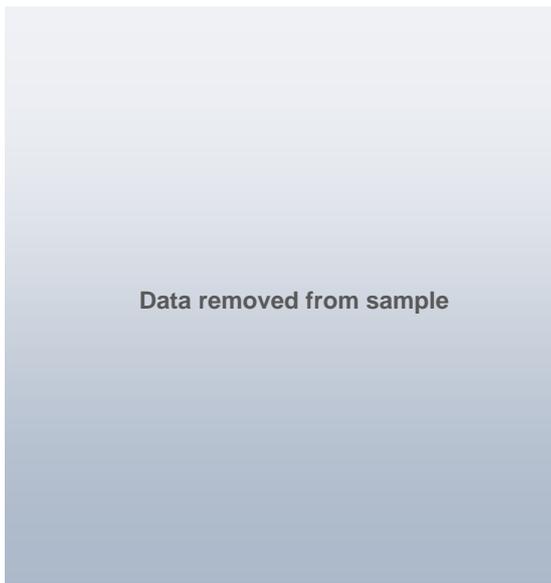
	Fine Wines/ Champagne and Spirits	Personal Luxury	Designer Apparel and Footwear (Ready-to-Wear)	Luxury Eyewear	Luxury Jewellery	Luxury Leather Goods
Retail Channels - Retail Offline -- Grocery Retailers	Data removed from sample					

- Non-Grocery Retailers
- General Merchandise Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Retail E-Commerce
- Total



- Luxury Wearables Electronics
- Luxury Timepieces
- Luxury Writing Instruments and Stationery
- Super Premium Beauty and Personal Care

- Retail Channels
- Retail Offline
- Grocery Retailers
- Non-Grocery Retailers
- General Merchandise Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Retail E-Commerce
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Forecast Sales of Luxury Goods by Category: Value 2023-2028

EUR million	2023	2024	2025	2026	2027	2028
Luxury Foodservice	Data removed from sample					
Luxury Hotels						
Experiential Luxury						
Fine Wines						

Luxury Spirits	397.9	404.1	412.7	423.0	431.4	438.8
Fine Wines/Champagne and Spirits	1,439.9	1,494.3	1,540.4	1,599.6	1,653.9	1,709.7
Premium and Luxury Cars	45,161.3	56,590.6	66,023.4	67,253.8	68,176.3	69,059.2
Designer Apparel and Footwear (Ready-to-Wear)	5,856.2	6,016.7	6,133.6	6,222.7	6,274.3	6,326.0
Luxury Eyewear	791.2	800.3	807.0	812.4	814.5	816.5
Luxury Jewellery	2,071.7	2,110.0	2,151.7	2,191.7	2,212.2	2,233.0
Luxury Leather Goods	1,481.4	1,547.6	1,595.1	1,633.6	1,663.3	1,692.4
Luxury Wearables Electronics	33.0	33.5	34.2	32.5	30.0	28.0
Luxury Timepieces	1,857.1	1,872.5	1,901.1	1,933.2	1,947.1	1,961.3
Luxury Writing Instruments and Stationery	81.8	86.1	87.6	87.0	85.4	84.4
Super Premium Beauty and Personal Care	1,769.1	1,790.3	1,822.3	1,848.1	1,861.3	1,874.3
Personal Luxury	13,941.5	14,257.1	14,532.5	14,761.3	14,888.1	15,015.9
Luxury Goods	62,508.2	74,528.2	84,488.8	86,179.5	87,447.3	88,688.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Forecast Sales of Luxury Goods by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Luxury Foodservice			
Luxury Hotels			
Experiential Luxury			
Fine Wines			
Luxury Spirits			
Fine Wines/Champagne and Spirits			
Premium and Luxury Cars			
Designer Apparel and Footwear (Ready-to-Wear)			
Luxury Eyewear			
Luxury Jewellery			
Luxury Leather Goods			
Luxury Wearables Electronics			
Luxury Timepieces			
Luxury Writing Instruments and Stationery			
Super Premium Beauty and Personal Care			
Personal Luxury			
Luxury Goods			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

DISCLAIMER

Forecast closing date: 12 June 2023

Report closing date: 1 October 2023

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access

strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

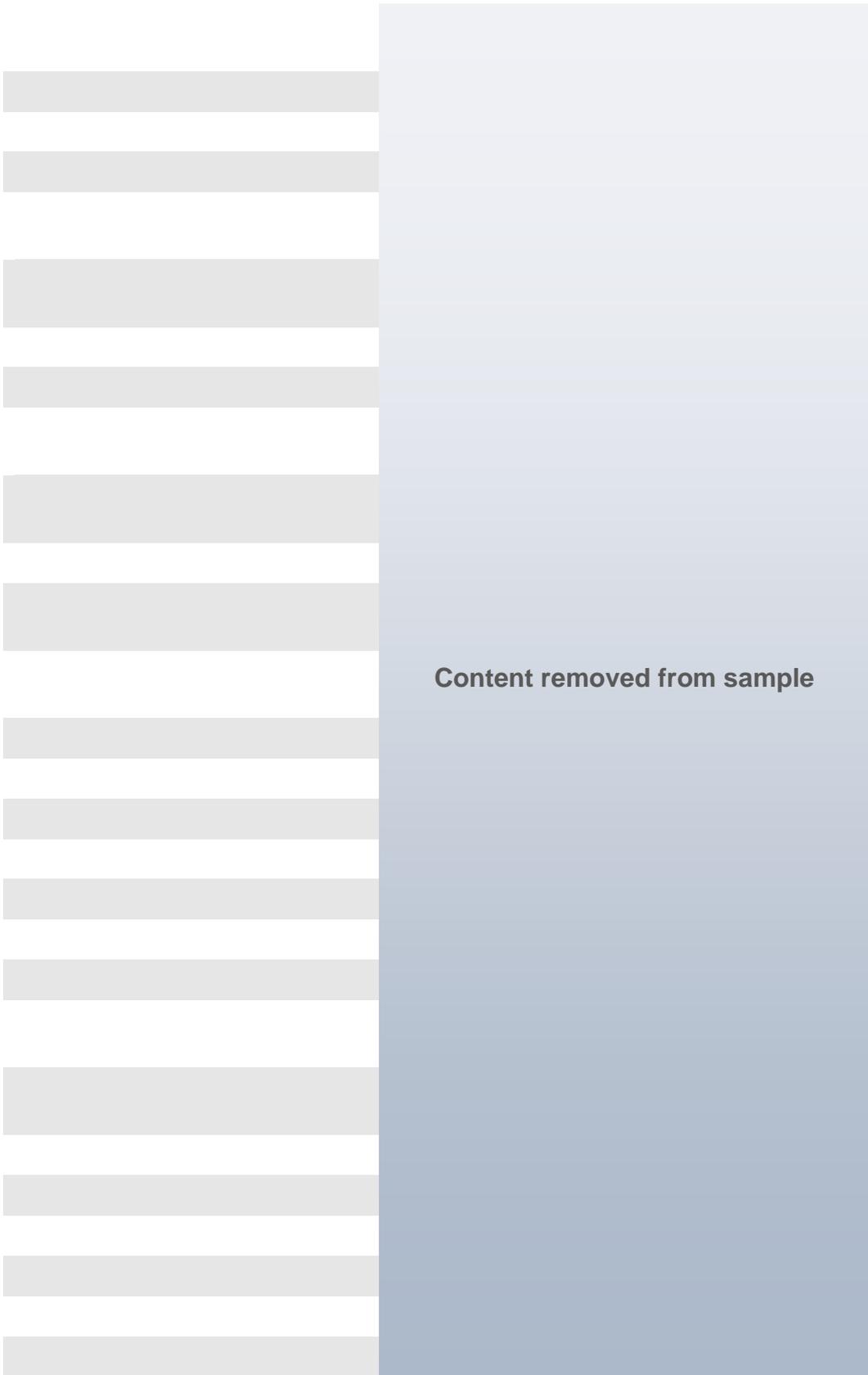
Sources used during the research included the following:

Summary 1 Research Sources

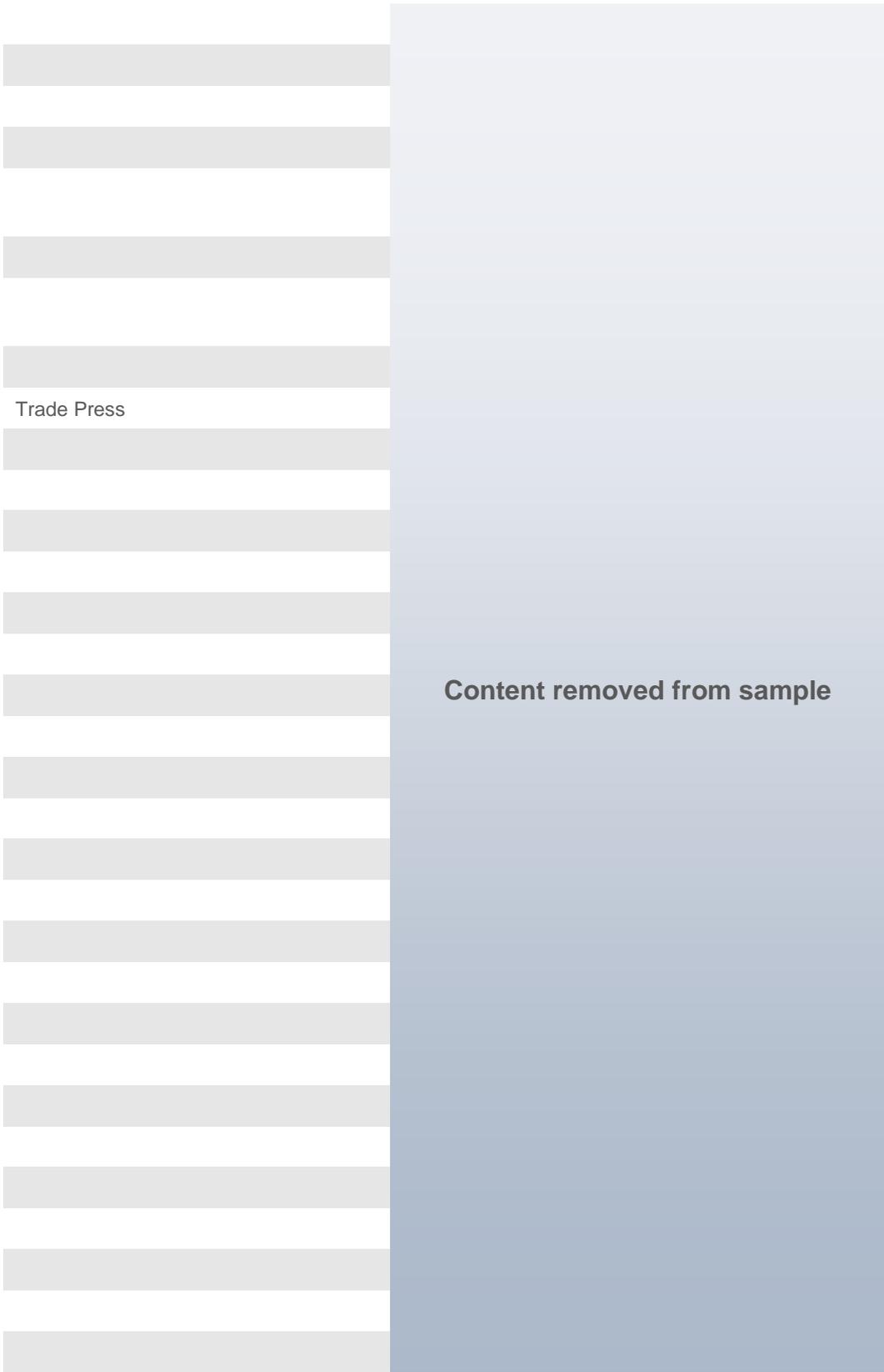
Official Sources

Trade Associations

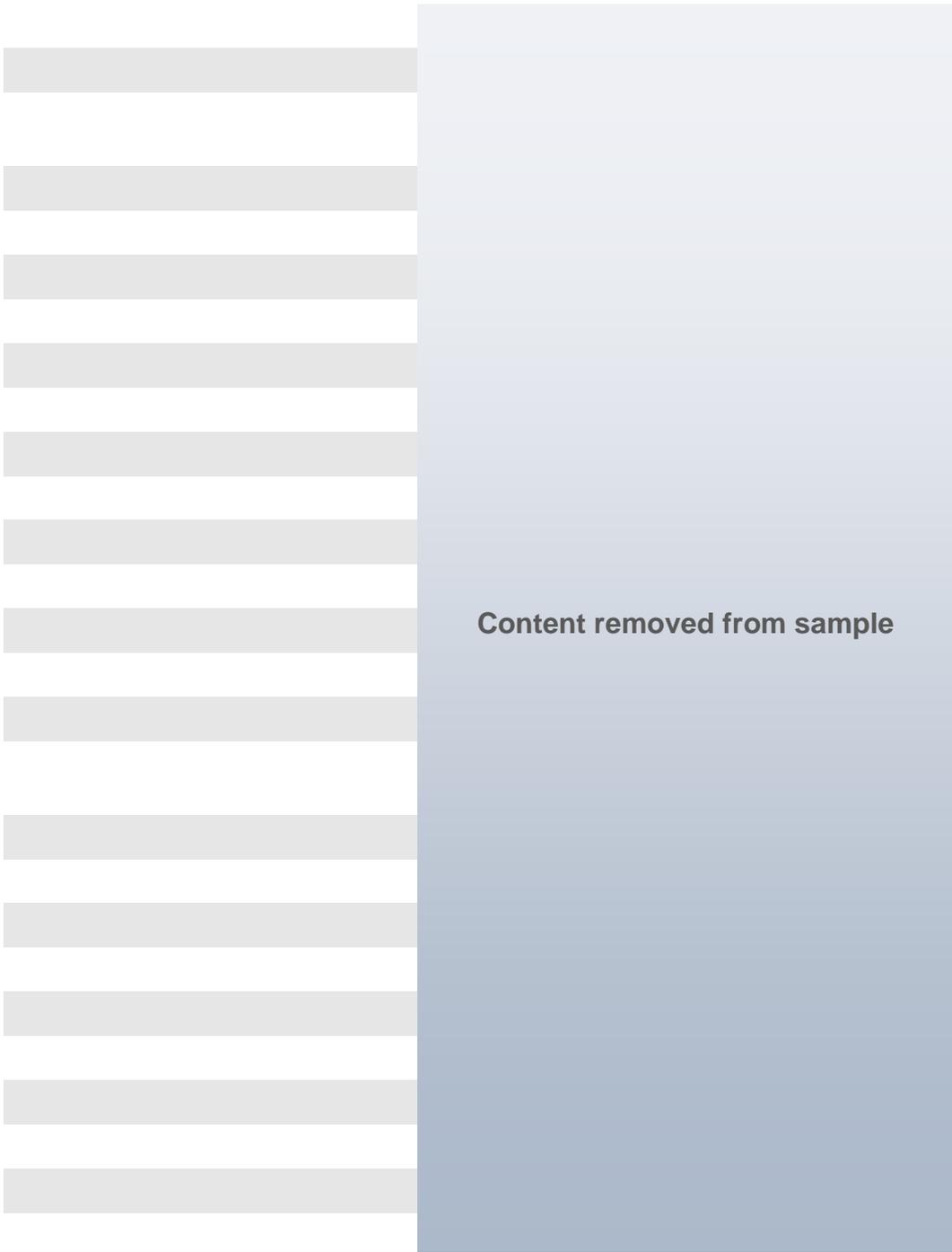
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Trade Press



Source: Euromonitor International