EXECUTIVE SUMMARY

Beaut and personal care in 2023: The big picture
2023 key trends
Competitive landscape
Retailing developments
What next for beauty and personal care?

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DISCLAIMER

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2023 DEVELOPMENTS

Shift in lifestyle preferences, as well as growing knowledge amongst parents regarding the significance of using safe and natural products
Increasing shift towards cheaper products for children above 3 years-old
Sustainability more pronounced

PROSPECTS AND OPPORTUNITIES

Premium, dermocosmetic and sustainable products will continue to drive the category
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Bath and Shower in the Czech Republic
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2023 DEVELOPMENTS

Bath and shower most impacted by trading down towards cheaper alternatives and private label
Bar soaps remains popular, but struggles in terms of volume sales
Added value, such as increased hydration/essential oils or deep relaxation, plays important role

PROSPECTS AND OPPORTUNITIES

Refillable bottles and pouches to take significant share in the bath and shower category
Wellbeing trend and new formats to boost sales of bath additives
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Colour Cosmetics in the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Post-pandemic growth continues in 2023 in both retail value and volume
Added benefits and convenience boost demand for specific colour cosmetics products
Press-on nails unexpected new power player

PROSPECTS AND OPPORTUNITIES

Line between colour cosmetics and skin care will continue to blur
Technological advances are likely to change how consumers shop for colour cosmetics
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Stick deodorants the preferred format
Budget constrained consumers seek better value and trade down to less expensive alternatives
Beiersdorf reduces CO2 footprint of deodorant aerosol cans

PROSPECTS AND OPPORTUNITIES
International brands likely to maintain their dominant positions
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Depilatories in the Czech Republic

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Discounters gain further market share as consumers seek cheaper alternatives
Women’s pre-shave products drive growth due to new formats

PROSPECTS AND OPPORTUNITIES
Growth potential remains fragile, with only marginal value and volume growth expected
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Refillable fragrance growing on popularity
Premium unisex fragrances and sets remained popular during the review period

PROSPECTS AND OPPORTUNITIES
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Premium fragrances set to perform well over the forecast period
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**Hair Care in the Czech Republic**

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**2023 DEVELOPMENTS**

- Skinification trend penetrating the hair care category
- Major retailer in hair care acquires competitor
- Salon professional hair care continues healthy value growth, but volumes see further decline

**PROSPECTS AND OPPORTUNITIES**

- Hair care set to see further retail value growth, but volume likely to remain under pressure
- Styling agents forecast to see positive performance
- The competitive landscape unlikely to see dramatic changes

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**Men's Grooming in the Czech Republic**

**KEY DATA FINDINGS**

**2023 DEVELOPMENTS**

- Men's grooming posts solid retail value growth
- The Italian brand, Borotalco, introduces its new men's line
- Angry beards opens its first offline store

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Demand for tooth whiteners continues to rise
Electric toothbrushes sees further polarisation

PROSPECTS AND OPPORTUNITIES
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Skin Care in the Czech Republic

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SPF is main trend in skin care, while skinimalism increases in popularity
British cosmetics brand, Elemis, officially enters the Czech market
High inflation and rising prices continue to challenge volume sales, while retail value grows strongly

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Longevity research set to become new influence with hope of making skin biologically younger
The outlook is positive
Personalisation and addressing specific skin problems to remain in spotlight in skin care categories
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2023 DEVELOPMENTS
Mass beauty and personal care products focus on adding premium elements to support sales
Stronger inclination towards private label brands
Sun care amongst the most dynamic mass market categories

PROSPECTS AND OPPORTUNITIES
Value growth will be limited, with volume sales improving
Private label expected to thrive, responding to consumers’ price sensitivity
Premiumisation trend will remain a major limiting force for mass market categories

CATEGORY DATA

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