Beauty and Personal Care in Austria

EXECUTIVE SUMMARY

Beauty and personal care in 2022: The big picture
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Retailing developments
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DISCLAIMER

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Baby and Child-Specific Products in Austria

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2022 DEVELOPMENTS

Low birth rate hinders retail volume growth in baby and child-specific products
Players look to reduce their ecological footprint
Procter & Gamble and Johnson & Johnson leverage strong offers and sustainability strategies

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Bath additives remain a popular choice despite fading home spa and wellness trend
Bar soap fits with sustainability trend

PROSPECTS AND OPPORTUNITIES

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Colour Cosmetics in Austria

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Dynamic performance as consumers resume work and social norms, while face mask regulation eases
Company activity and renewed opportunities for application push lip products
L’Oréal leverages strong portfolio and investment to stay ahead of the field

PROSPECTS AND OPPORTUNITIES

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Long-lasting products to help facial make-up drive growth rates
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Unilever Austria invests in new products and sustainability

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Procter & Gamble leverages a strong brand and investments to lead the category

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Stable competitive landscape
Personal touch continues to favour health and beauty specialists

PROSPECTS AND OPPORTUNITIES
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Reopening of hair salons boosts salon professional hair care but damages the demand for colourants
Large brand portfolio and investment keep Henkel Central & Eastern Europe at the top

PROSPECTS AND OPPORTUNITIES
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CATEGORY DATA

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Manufacturers respond to a renewed demand for men's deodorants
Procter & Gamble leverages a strong brand and new product development to stay ahead of the field

PROSPECTS AND OPPORTUNITIES
Rising costs to exert upward pressure on prices and stimulate value sales
Beard trend to continue to influence men's shaving
Sustainability to become a watchword in men's grooming
KEY DATA FINDINGS

Oral care in Austria

2022 DEVELOPMENTS
Rebound in retail volume terms, while higher prices stimulate retail current value growth
Ongoing shift to power toothbrushes, but manual toothbrushes retain the preference of consumers
Procter & Gamble leads the way with strong brands in power toothbrushes and toothpaste

PROSPECTS AND OPPORTUNITIES
Switch from manual to electric toothbrushes is set to continue
Added-value toothpaste to drive value sales
Dental floss and mouthwashes/dental rinses to ride oral care wave

KEY DATA FINDINGS

Skin care in Austria

2022 DEVELOPMENTS
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Players step up innovation and new product development
Consumers remain loyal to tried and trusted players and brands

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SUN CARE IN AUSTRIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

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Sun protection continues to shape the performance of sun care
Beiersdorf remains the leading player in sun protection and aftersun

PROSPECTS AND OPPORTUNITIES

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PREMIUM BEAUTY AND PERSONAL CARE IN AUSTRIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

High inflation and increased demand boost the performance of premium beauty and personal care
Resumption of out-home lifestyles spurs premium colour cosmetics
Strong leaders but affordable premium trend boosts “others”

PROSPECTS AND OPPORTUNITIES

Slower growth anticipated in a tough economic climate
Skin care and fragrances set to continue to lead the way in premium beauty and personal care
Sustainability to grow in importance in company strategies

CATEGORICAL DATA

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Mass Beauty and Personal Care in Austria

KEY DATA FINDINGS

2022 DEVELOPMENTS
Return to pre-pandemic lifestyles and inflationary pressures boost demand and retail value sales, respectively
Mass colour cosmetics benefits from the resumption of out-of-home lifestyles while a long, hot summer and holidays boost mass sun care
L’Oréal and Beiersdorf continue to compete fiercely

PROSPECTS AND OPPORTUNITIES
Price advantage to maintain popularity of mass beauty and personal care
Wide outlet and product choice to favour health and personal care stores
Multinationals to shape the direction of beauty and personal care

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