EXECUTIVE SUMMARY

Beauty and personal care in 2022: The big picture
2022 key trends
Competitive landscape
Retailing developments
What next for beauty and personal care?

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DISCLAIMER

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Baby and Child-Specific Products in Austria

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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

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Colour Cosmetics in Austria

KEY DATA FINDINGS

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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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KEY DATA FINDINGS

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New launches add dynamism to depilatories
Procter & Gamble leverages a strong brand and investments to lead the category

PROSPECTS AND OPPORTUNITIES
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KEY DATA FINDINGS

2022 DEVELOPMENTS
Higher prices drive retail current value growth
Stable competitive landscape
Personal touch continues to favour health and beauty specialists

PROSPECTS AND OPPORTUNITIES
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KEY DATA FINDINGS

2022 DEVELOPMENTS

Inflationary pressure boosts retail value over volume sales in 2022
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

New innovative products to boost conditioners and treatments
Shampoos to continue to lead sales
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CATEGORY DATA

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Men’s Grooming in Austria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Return to out-of-home lifestyles supports demand, while price increases stimulate value sales
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

2022 DEVELOPMENTS

Skin care demand stabilises while inflationary pressure stimulates value sales
Players step up innovation and new product development
Consumers remain loyal to tried and trusted players and brands

PROSPECTS AND OPPORTUNITIES

Skin care to remain a preoccupation for Austrian consumers
Busy lifestyles and the natural trend to determine purchasing decisions
Sophisticated approach expected from leading players
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### Key Data Findings

#### 2022 Developments

- Returns to summer holidays and outdoor lifestyles stimulate the use of sun care products
- Sun protection continues to shape the performance of sun care
- Beiersdorf remains the leading player in sun protection and aftersun

#### Prospects and Opportunities

- Bright prospects for sun care due to long and hot summers
- Growing importance of ingredients and sustainability
- Economic concerns to maintain mass sun care leadership

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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

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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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