Beauty and Personal Care in Estonia

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture
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Retailing developments
What next for beauty and personal care?

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Baby and Child-Specific Products in Estonia

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2023 DEVELOPMENTS

Positive retail volume growth despite ongoing price inflation
Sun care is in demand as socialising and travel increases following COVID-19
Procter & Gamble retains the lead with well-established brand Pampers

PROSPECTS AND OPPORTUNITIES

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Private label could increase its foothold as pharmacies are also set to gain share

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Intimate hygiene gains ground as awareness of product benefits rises
Local products are popular; however, Colgate-Palmolive maintains its lead

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Colour Cosmetics in Estonia

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Positive growth despite rising prices as consumers continue to seek quality
Simplicity and convenience are rising trends on the colour cosmetics landscape
Global players maintain the lead as L'Oréal retains its top spot in Estonia

PROSPECTS AND OPPORTUNITIES
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Social media and innovative use of technology are changing the retail environment
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Roll-ons remain the most popular format, while sticks drive retail growth
Old Spice focuses on strong advertising to drive growth in 2023
PROSPECTS AND OPPORTUNITIES
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Retailers look to increase competition on a landscape led by major players

PROSPECTS AND OPPORTUNITIES
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Fragmentation on the landscape, however, classic fragrances remain in demand
Online prices and promotions attract consumers during 2023

PROSPECTS AND OPPORTUNITIES
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Celebrity and fashion fragrances create opportunities for growth on the mass landscape
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Limited presence of local brands on the hair care landscape

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International players lead while Old Spice increases its advertising
Premium fragrances outperform mass fragrances in 2023

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Colgate and Sensodyne remain the leading brands in 2023

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A strong year for skin care products as facial routines remain firmly in place
Facial care drives sales with a wide product portfolio boosting growth
Global players maintain their lead as L’Oréal tops the skin care landscape

PROSPECTS AND OPPORTUNITIES
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Sun care benefits from increasing awareness of the dangers of sun exposure
International players lead, while local offerings have appeal in premium and mass products.

PROSPECTS AND OPPORTUNITIES
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Premium Beauty and Personal Care in Estonia

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International players lead premium offerings, while small local players go niche
E-commerce plays an increasing role in growing the share of premium goods

PROSPECTS AND OPPORTUNITIES
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Mass Beauty and Personal Care in Estonia

KEY DATA FINDINGS

2023 DEVELOPMENTS
Mass products retain high levels of retail value sales as consumers appreciate affordable goods
Major global manufacturers offer good-quality, affordable mass items
International players lead with well-recognised and widely available brands

PROSPECTS AND OPPORTUNITIES

Mass products will continue to retain the lead as daily essentials drive sales
Bath and shower continues to be dominated by mass products
Local presence will remain low as global giants continue to lead

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