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 Germany

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Growth momentum continues in 2022
Baby dermocosmetics hold a strong position
Baby and child-specific sun care sees the most dynamic performance

PROSPECTS AND OPPORTUNITIES

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E-commerce continues growing in bath and shower despite store reopening

PROSPECTS AND OPPORTUNITIES

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PROSPECTS AND OPPORTUNITIES
Fragrances has a positive outlook
E-commerce and beauty specialists will continue to offer price deals
Concentration will be key
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2022 DEVELOPMENTS

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Smaller players increase the fragmentation in hair care in Germany
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Men's Grooming in Germany

KEY DATA FINDINGS

2022 DEVELOPMENTS

Wellness habits support growth in men’s grooming in Germany
Private label continues growing in a category led by Procter & Gamble
E-commerce maintains growth despite reopening of physical stores

PROSPECTS AND OPPORTUNITIES

Clean ingredients act as preventative care in men’s grooming
Product packaging to see innovation towards sustainability
Growth expected in the forecast period due to increasingly aware male consumers

CARE DATA
## Oral Care in Germany

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#### 2022 DEVELOPMENTS

Health-conscious consumers drive dynamic value growth in 2022
GlaxoSmithKline remains the leader in oral care in Germany
E-commerce sees slower growth, but is here to stay

#### PROSPECTS AND OPPORTUNITIES

Greater health consciousness will support price stability
Prevention and health awareness lead the way in oral care
Sustainability and natural ingredients are growing concerns amongst consumers

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## Skin Care in Germany

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Skin care sees only slow value growth, due to the decline of body care
Dermocosmetics remain important in skin care
Focus on ingredients with specific claims

#### PROSPECTS AND OPPORTUNITIES

Skin care will continue to benefit from high consumer interest
High-performance products set to increase in popularity
At-home electronic facial devices likely to gain ground

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**Sun Care in Germany**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Growing awareness of the need for sun protection boosts sun care
Beiersdorf retains the lead with its well-known and widely available brands
Consumers seek premium products for better sun protection

**PROSPECTS AND OPPORTUNITIES**

Dynamic growth expected in the forecast period
Blurring the line between sun care, skin care, and colour cosmetics
Future of sun care likely to be multifunctional

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**Premium Beauty and Personal Care in Germany**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Premium beauty and personal care sees extraordinary growth
Premium sun protection leads the growth of sun care
L’Oréal Deutschland maintains its lead

**PROSPECTS AND OPPORTUNITIES**

Demand for premium products set to remain strong
Premium hair care will benefit from consumers’ stronger focus on hair care
Dermocosmetics will continue to benefit from consumers’ health awareness

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Mass Beauty and Personal Care in Germany

KEY DATA FINDINGS

2022 DEVELOPMENTS

Strong growth for mass beauty and personal care due to post-pandemic recovery

High temperatures drive growth for mass adult sun care and mass deodorants

Beiersdorf retains its lead, but L’Oréal narrows the gap

PROSPECTS AND OPPORTUNITIES

Private label likely to threaten mass brands

Mass skin care set to face more competition from premium brands

Mass hair care will remain an important category within mass beauty and personal care

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