



Passport

Baby and Child-specific Products in Austria

Euromonitor International

August 2024

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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BABY AND CHILD-SPECIFIC PRODUCTS IN AUSTRIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

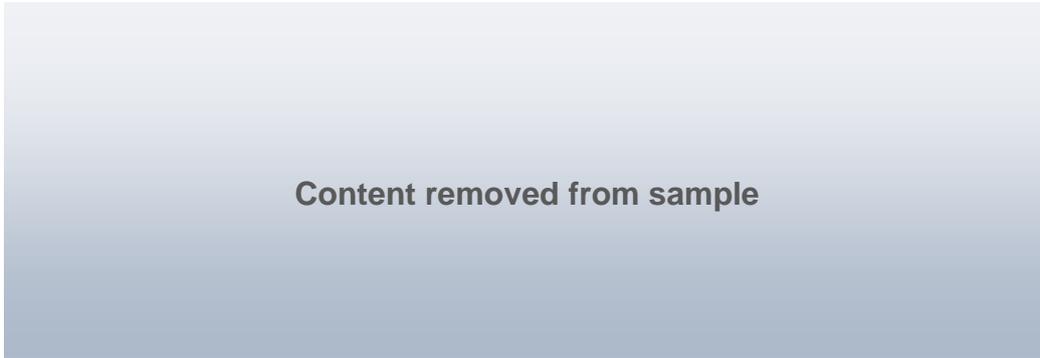
Prices continue to rise in baby and child-specific products

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Product innovation supports value growth

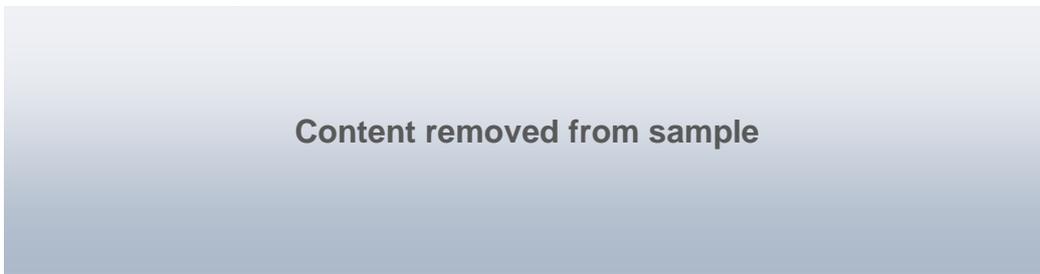
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Procter & gamble austria strengthens its lead

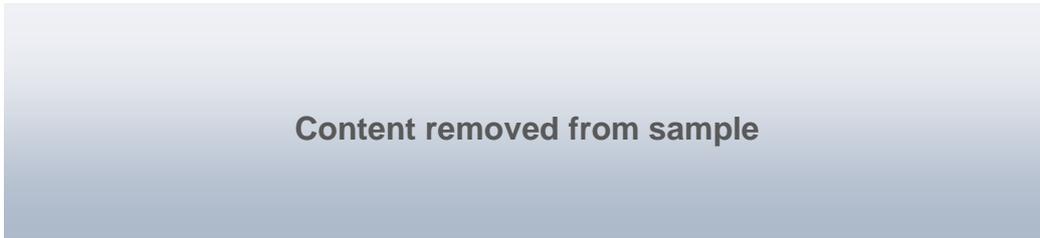


PROSPECTS AND OPPORTUNITIES

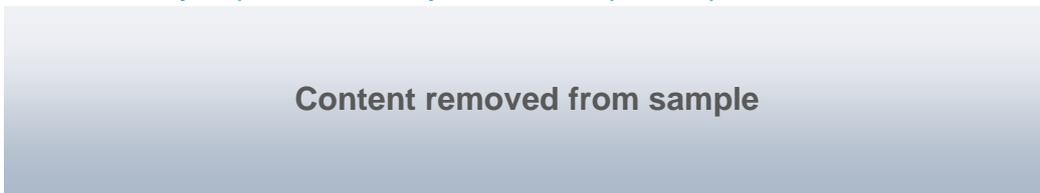
Steady pace of growth in volume and value terms



Baby wipes remain a key component of sales



Sustainability is pivotal to baby and child-specific products



CATEGORY DATA

Table 1 Sales of Baby and Child-specific Products by Category: Value 2018-2023

| EUR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|-------------|------|------|------|------|------|------|
|-------------|------|------|------|------|------|------|

Baby and Child-specific Products
 Baby and Child-specific Hair Care
 Baby and Child-specific Skin Care
 Baby and Child-specific Sun Care
 Baby and Child-specific Toiletries
 Baby Wipes
 Medicated Baby and Child-specific Products
 Nappy (Diaper) Rash Treatments



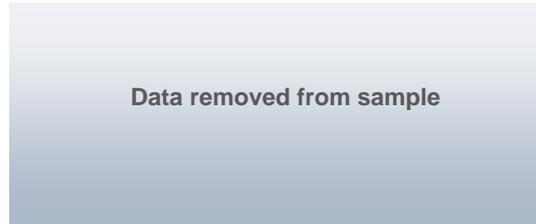
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

Baby and Child-specific Products
 Baby and Child-specific Hair Care
 Baby and Child-specific Skin Care
 Baby and Child-specific Sun Care
 Baby and Child-specific Toiletries
 Baby Wipes
 Medicated Baby and Child-specific Products
 Nappy (Diaper) Rash Treatments



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023

% retail value rsp

2018 2019 2020 2021 2022 2023

Premium
 Mass
 Total



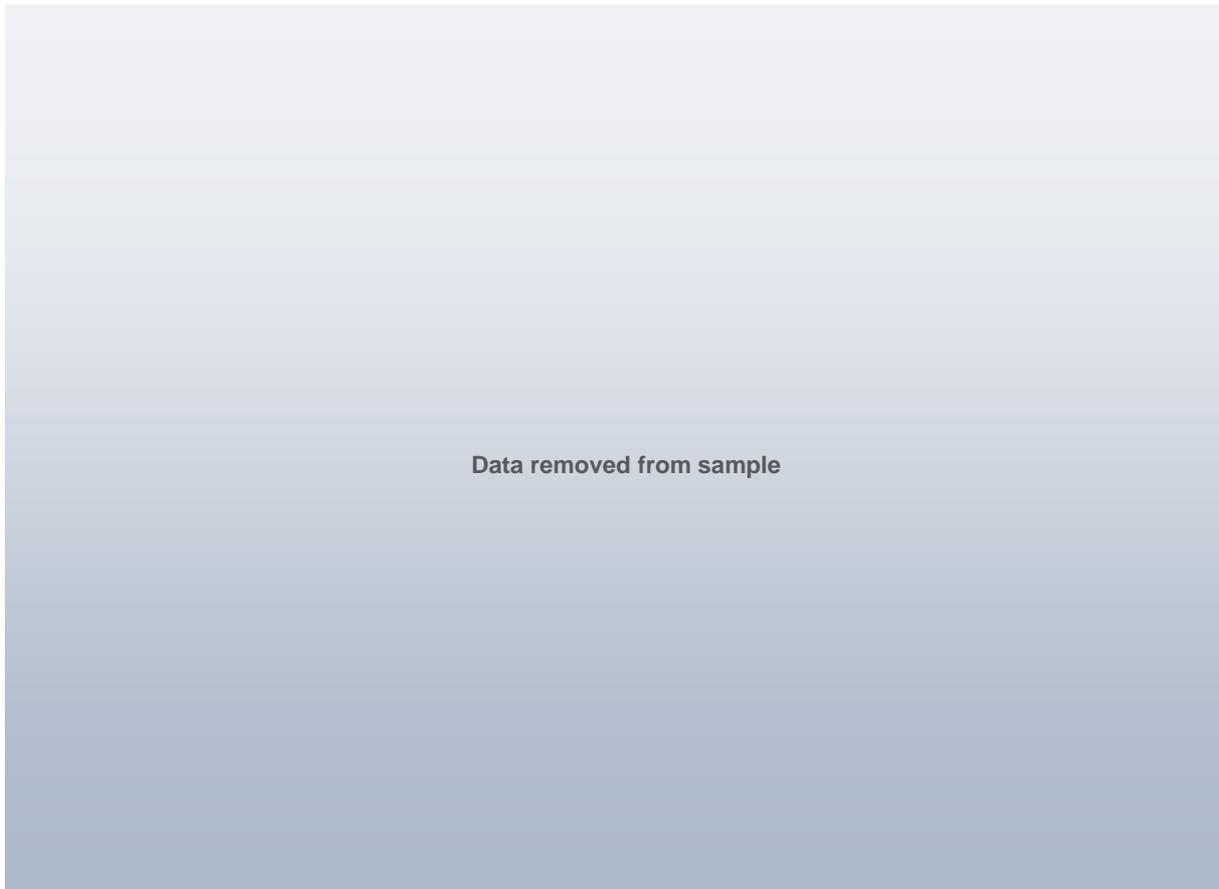
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023

% retail value rsp

Company 2019 2020 2021 2022 2023

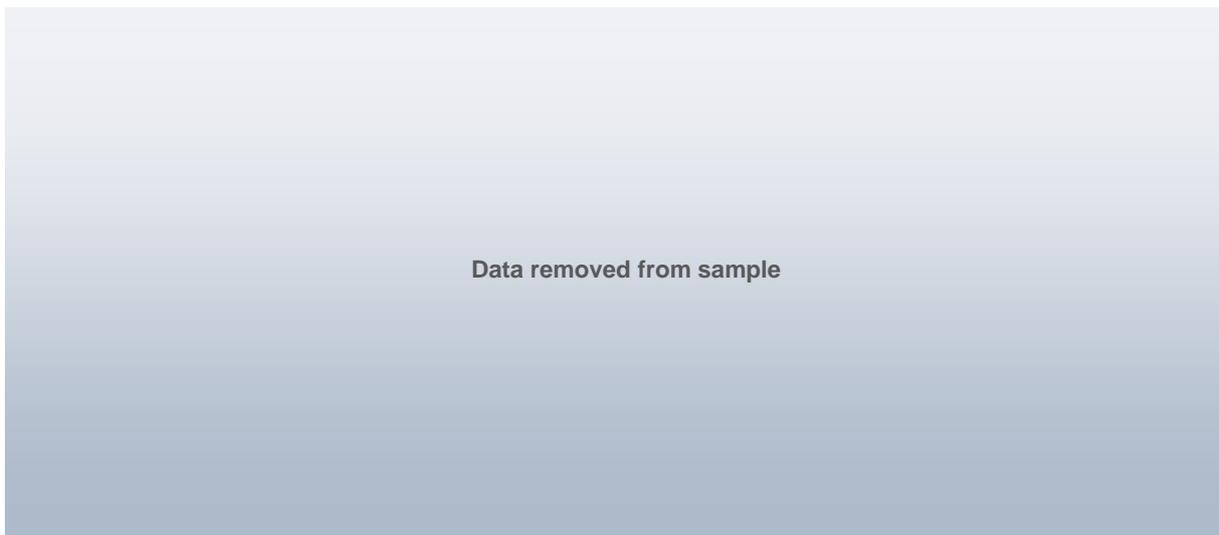


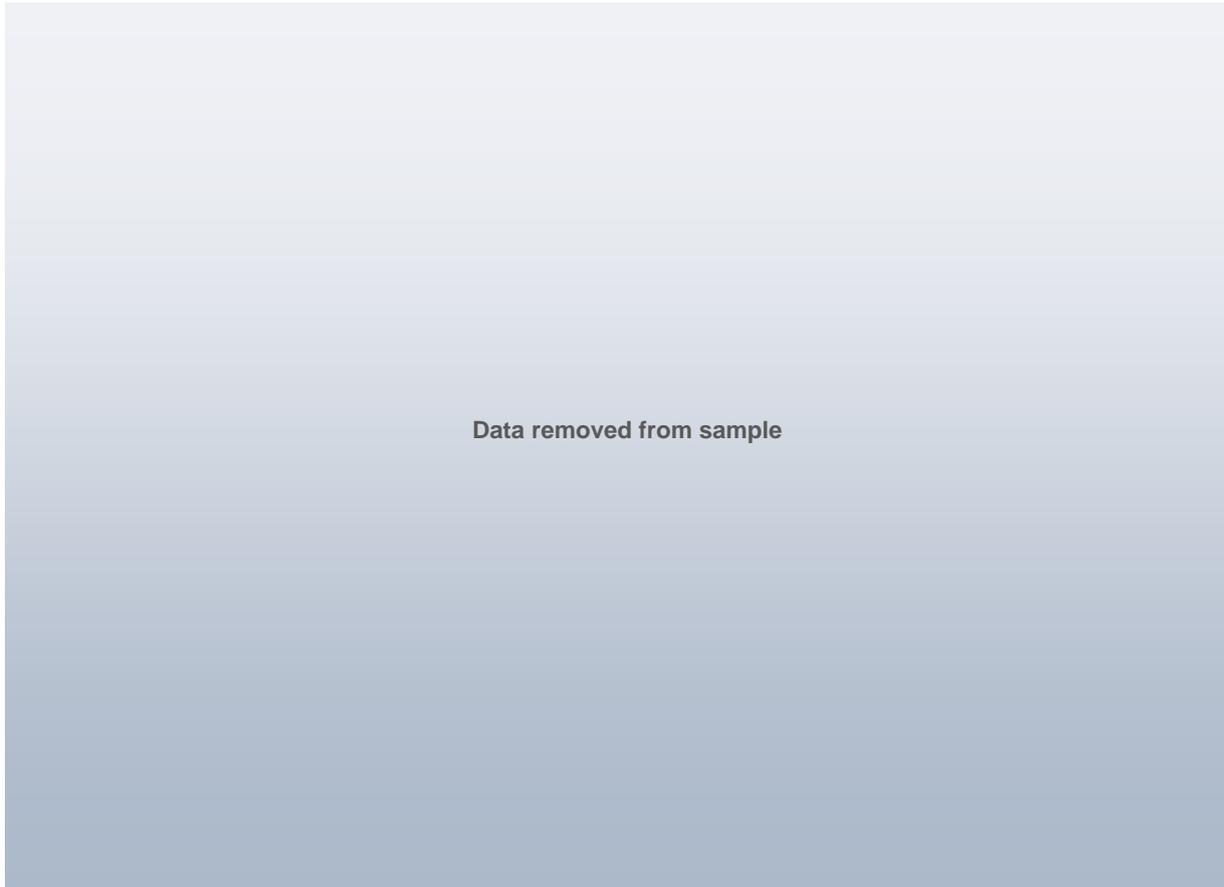


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023

| % retail value rsp Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|





Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2020-2023

| % retail value rsp Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|



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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

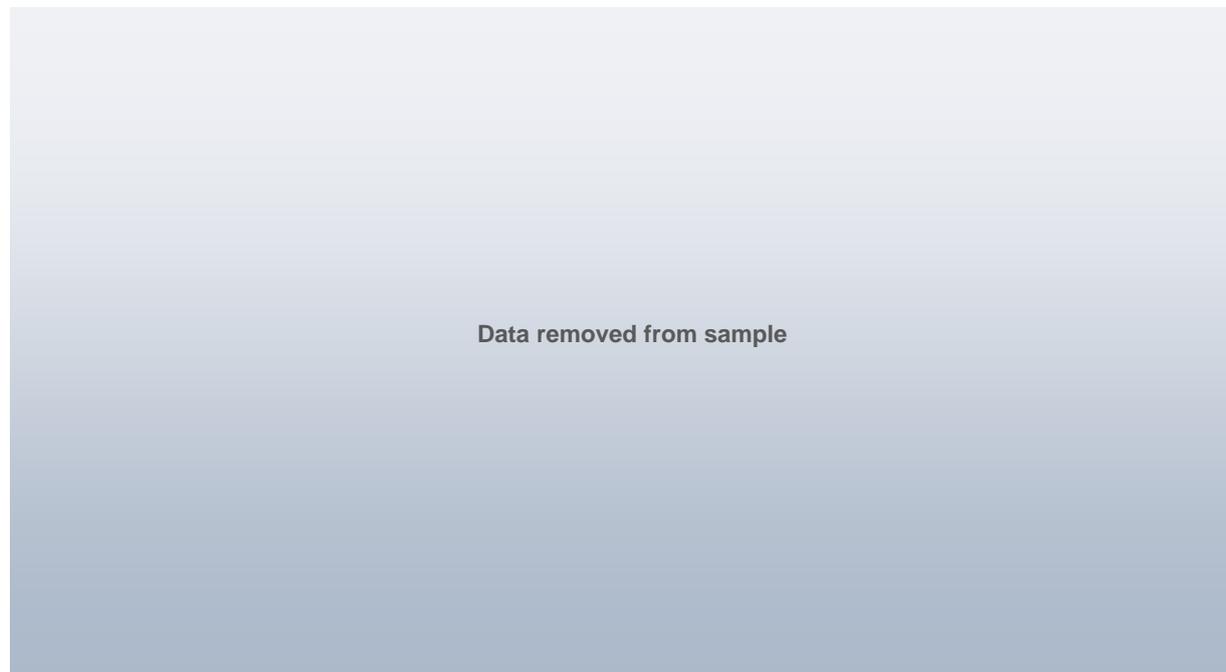
| % retail value rsp Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

| % retail value rsp Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028

| EUR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|-------------|------|------|------|------|------|------|
|-------------|------|------|------|------|------|------|

| | | | | | | |
|--|---------------------------------|--|--|--|--|--|
| Baby and Child-specific Products | Data removed from sample | | | | | |
| Baby and Child-specific Hair Care | | | | | | |
| Baby and Child-specific Skin Care | | | | | | |
| Baby and Child-specific Sun Care | | | | | | |
| Baby and Child-specific Toiletries | | | | | | |
| Baby Wipes | | | | | | |
| Medicated Baby and Child-specific Products | | | | | | |
| Nappy (Diaper) Rash Treatments | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

% constant value growth

| | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|--|---------------------------------|--------------|---------------|
| Baby and Child-specific Products | Data removed from sample | | |
| Baby and Child-specific Hair Care | | | |
| Baby and Child-specific Skin Care | | | |
| Baby and Child-specific Sun Care | | | |
| Baby and Child-specific Toiletries | | | |
| Baby Wipes | | | |
| Medicated Baby and Child-specific Products | | | |
| Nappy (Diaper) Rash Treatments | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

% retail value rsp

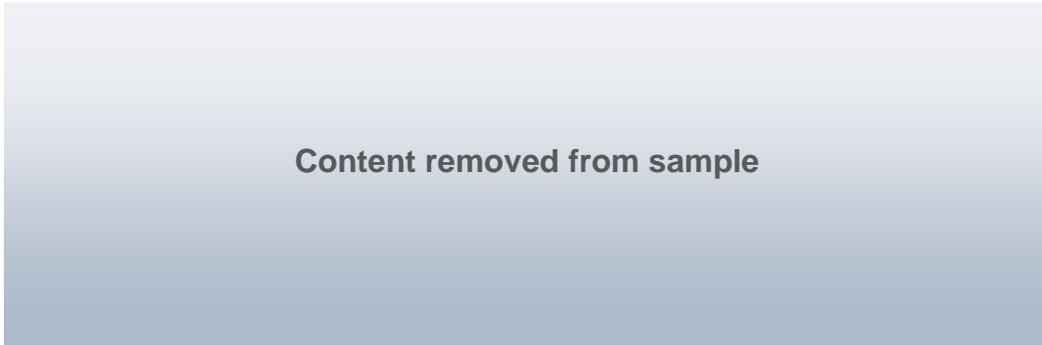
| | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---------|---------------------------------|------|------|------|------|------|
| Premium | Data removed from sample | | | | | |
| Mass | | | | | | |
| Total | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

BEAUTY AND PERSONAL CARE IN AUSTRIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

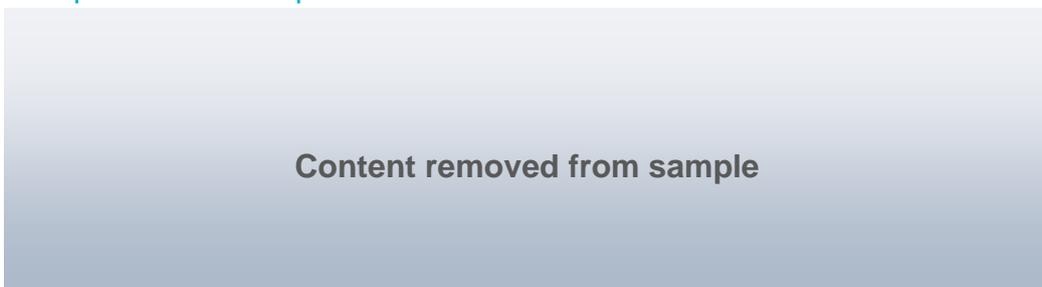
Beauty and personal care in 2023: The big picture



2023 key trends



Competitive landscape



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Retailing developments

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What next for beauty and personal care?

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Content removed from sample

MARKET DATA

Table 12 Sales of Beauty and Personal Care by Category: Value 2018-2023

| EUR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---------------------------------|------|------|------|------|------|
| Beauty and Personal Care | Data removed from sample | | | | | |
| Baby and Child-specific Products | | | | | | |
| Bath and Shower | | | | | | |
| Colour Cosmetics | | | | | | |
| Deodorants | | | | | | |
| Depilatories | | | | | | |
| Fragrances | | | | | | |
| Hair Care | | | | | | |
| Men's Grooming | | | | | | |
| Oral Care | | | | | | |
| Oral Care Excl Power Toothbrushes | | | | | | |
| Skin Care | | | | | | |
| Sun Care | | | | | | |
| Premium Beauty and Personal Care | | | | | | |
| Prestige Beauty and Personal Care | | | | | | |
| Mass Beauty and Personal Care | | | | | | |
| Dermocosmetics Beauty and Personal Care | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

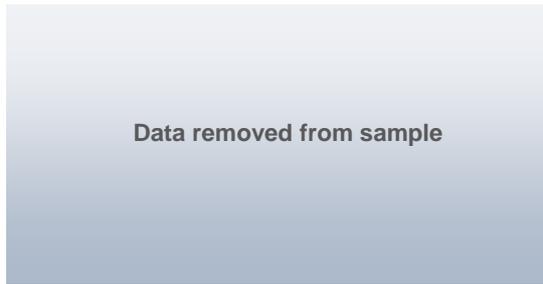
Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

Table 13 Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|----------------------------------|---------------------------------|--------------|---------------|
| Beauty and Personal Care | Data removed from sample | | |
| Baby and Child-specific Products | | | |
| Bath and Shower | | | |
| Colour Cosmetics | | | |
| Deodorants | | | |
| Depilatories | | | |
| Fragrances | | | |

- Hair Care
- Men's Grooming
- Oral Care
- Oral Care Excl Power Toothbrushes
- Skin Care
- Sun Care
- Premium Beauty and Personal Care
- Prestige Beauty and Personal Care
- Mass Beauty and Personal Care
- Dermocosmetics Beauty and Personal Care



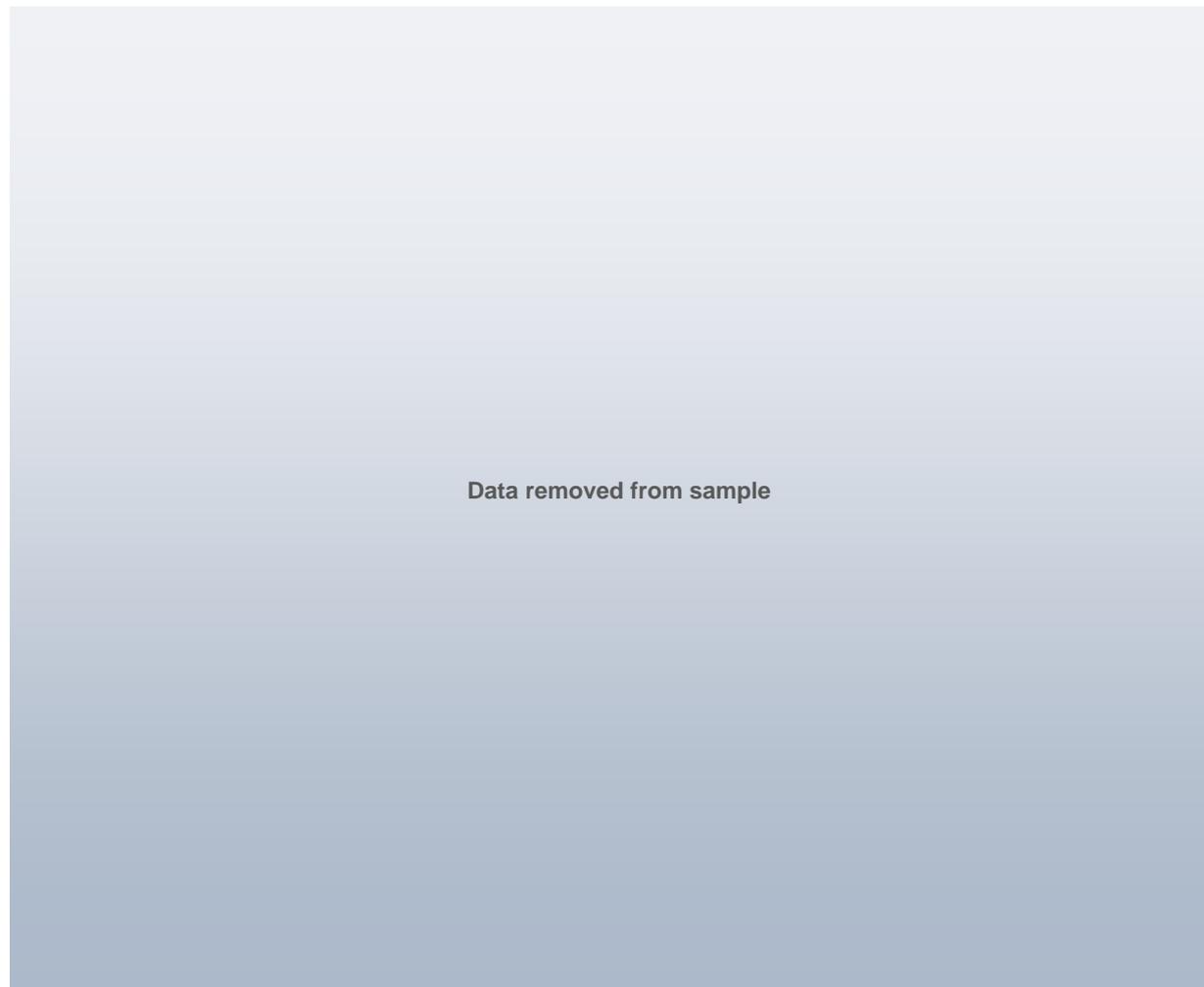
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

Table 14 GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

| % retail value rsp Company | 2019 | 2020 | 2021 | 2022 | 2023 |
|-------------------------------|------|------|------|------|------|
|-------------------------------|------|------|------|------|------|



Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

| % retail value rsp Company | 2019 | 2020 | 2021 | 2022 | 2023 |
|-------------------------------|------|------|------|------|------|
|-------------------------------|------|------|------|------|------|

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

% retail value rsp

| Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-------------|---------------|------|------|------|------|
|-------------|---------------|------|------|------|------|

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023

| % retail value rsp | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------------------|---------------------------------|------|------|------|------|------|
| Beauty and Personal Care | Data removed from sample | | | | | |
| Baby and Child-specific Products | | | | | | |
| Bath and Shower | | | | | | |
| Colour Cosmetics | | | | | | |
| Deodorants | | | | | | |
| Depilatories | | | | | | |
| Fragrances | | | | | | |
| Hair Care | | | | | | |
| Men's Grooming | | | | | | |
| Oral Care | | | | | | |
| Skin Care | | | | | | |
| Sun Care | | | | | | |
| Mass Beauty and Personal Care | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 Distribution of Beauty and Personal Care by Format: % Value 2018-2023

| % retail value rsp | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|---------------------------------|------|------|------|------|------|
| Retail Channels | Data removed from sample | | | | | |
| - Retail Offline | | | | | | |
| -- Grocery Retailers | | | | | | |
| --- Convenience Retail | | | | | | |
| ---- Convenience Stores | | | | | | |
| ---- Forecourt Retailers | | | | | | |
| --- Supermarkets | | | | | | |
| --- Hypermarkets | | | | | | |
| --- Discounters | | | | | | |
| --- Warehouse Clubs | | | | | | |
| --- Food/drink/tobacco specialists | | | | | | |
| --- Small Local Grocers | | | | | | |
| -- Non-Grocery Retailers | | | | | | |
| --- General Merchandise Stores | | | | | | |
| ---- Department Stores | | | | | | |
| ---- Variety Stores | | | | | | |
| --- Apparel and Footwear Specialists | | | | | | |
| --- Appliances and Electronics Specialists | | | | | | |

- Home Products Specialists
- Health and Beauty Specialists
- Beauty Specialists
- Pharmacies
- Optical Goods Stores
- Health and Personal Care Stores
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hair Salons
- Total



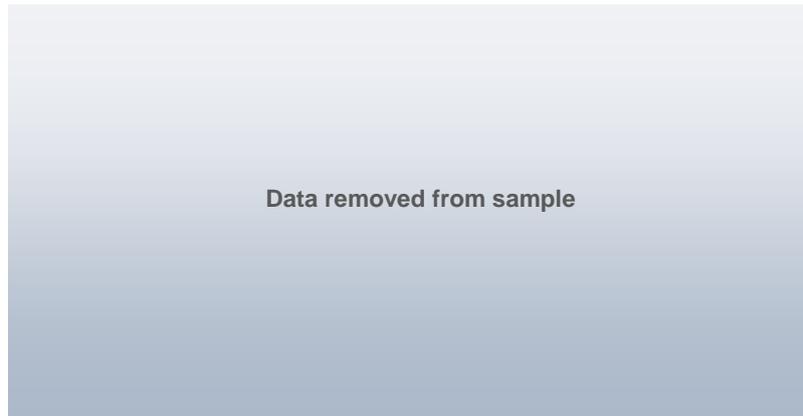
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Distribution of Beauty and Personal Care by Format and Category: % Value 2023

% retail value rsp

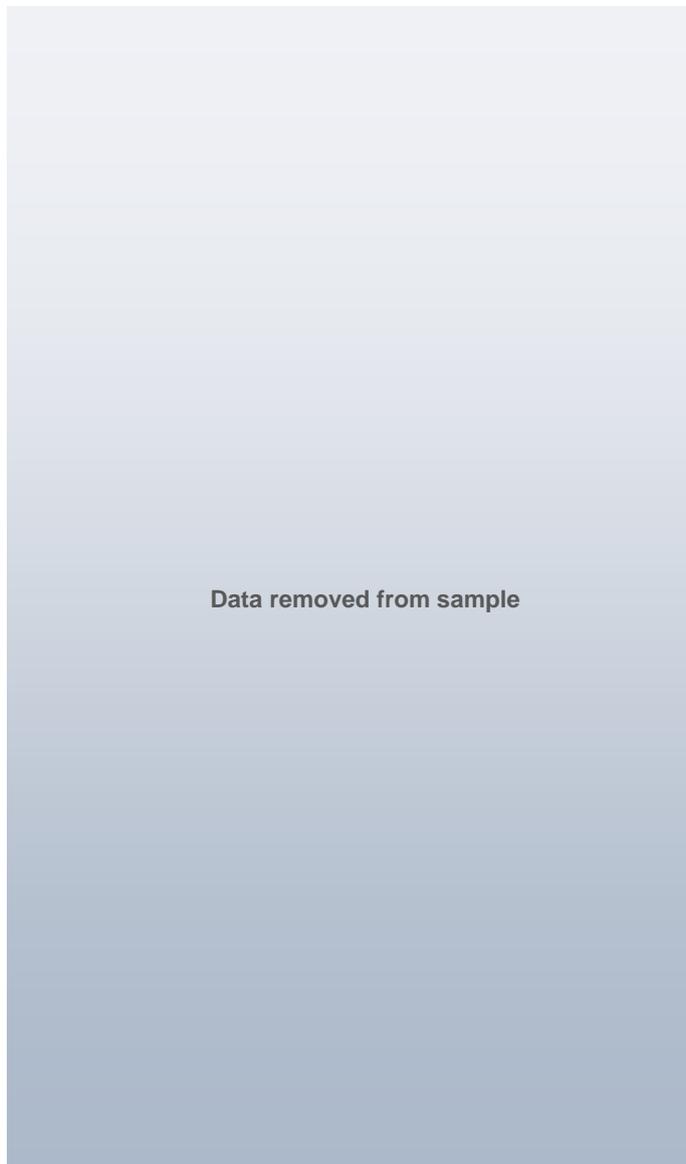
| | Baby and Child-specific Products | Bath and Shower | Colour Cosmetics | Deodorants | Depilatories | Fragrances |
|--|----------------------------------|-----------------|------------------|------------|--------------|------------|
| Retail Channels | Data removed from sample | | | | | |
| - Retail Offline | | | | | | |
| -- Grocery Retailers | | | | | | |
| --- Convenience Retail | | | | | | |
| ---- Convenience Stores | | | | | | |
| ---- Forecourt Retailers | | | | | | |
| --- Supermarkets | | | | | | |
| --- Hypermarkets | | | | | | |
| --- Discounters | | | | | | |
| --- Warehouse Clubs | | | | | | |
| --- Food/drink/tobacco specialists | | | | | | |
| --- Small Local Grocers | | | | | | |
| -- Non-Grocery Retailers | | | | | | |
| --- General Merchandise Stores | | | | | | |
| ---- Department Stores | | | | | | |
| ---- Variety Stores | | | | | | |
| --- Apparel and Footwear Specialists | | | | | | |
| --- Appliances and Electronics Specialists | | | | | | |
| --- Home Products Specialists | | | | | | |
| --- Health and Beauty Specialists | | | | | | |
| ---- Beauty Specialists | | | | | | |

- Pharmacies
- Optical Goods Stores
- Health and Personal Care Stores
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hair Salons
- Total



Hair Care Men's Grooming Oral Care Skin Care Sun Care

- Retail Channels
- Retail Offline
- Grocery Retailers
- Convenience Retail
- Convenience Stores
- Forecourt Retailers
- Supermarkets
- Hypermarkets
- Discounters
- Warehouse Clubs
- Food/drink/tobacco specialists
- Small Local Grocers
- Non-Grocery Retailers
- General Merchandise Stores
- Department Stores
- Variety Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Beauty Specialists
- Pharmacies
- Optical Goods Stores
- Health and Personal Care Stores
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hair Salons
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SK = skin care; SU = sun care

Table 20 Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

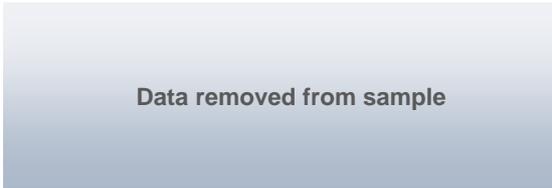
| EUR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|---------------------------------|------|------|------|------|------|
| Beauty and Personal Care | Data removed from sample | | | | | |
| Baby and Child-specific Products | | | | | | |
| Bath and Shower | | | | | | |
| Colour Cosmetics | | | | | | |
| Deodorants | | | | | | |
| Depilatories | | | | | | |
| Fragrances | | | | | | |
| Hair Care | | | | | | |
| Men's Grooming | | | | | | |
| Oral Care | | | | | | |
| Oral Care Excl Power Toothbrushes | | | | | | |
| Skin Care | | | | | | |
| Sun Care | | | | | | |
| Premium Beauty and Personal Care | | | | | | |
| Prestige Beauty and Personal Care | | | | | | |
| Mass Beauty and Personal Care | | | | | | |
| Dermocosmetics Beauty and Personal Care | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
 Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

Table 21 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|----------------------------------|---------------------------------|--------------|---------------|
| Beauty and Personal Care | Data removed from sample | | |
| Baby and Child-specific Products | | | |
| Bath and Shower | | | |
| Colour Cosmetics | | | |
| Deodorants | | | |
| Depilatories | | | |
| Fragrances | | | |
| Hair Care | | | |
| Men's Grooming | | | |
| Oral Care | | | |

Oral Care Excl Power Toothbrushes
 Skin Care
 Sun Care
 Premium Beauty and Personal Care
 Prestige Beauty and Personal Care
 Mass Beauty and Personal Care
 Dermocosmetics Beauty and Personal Care



- Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
- Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

DISCLAIMER

Forecast and scenario closing date: 8 April 2024

Report closing date: 5 August 2024

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

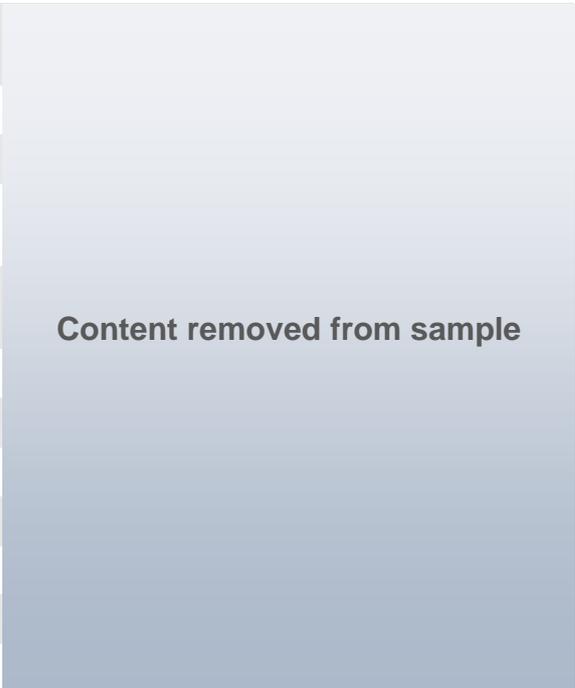
Sources used during the research included the following:

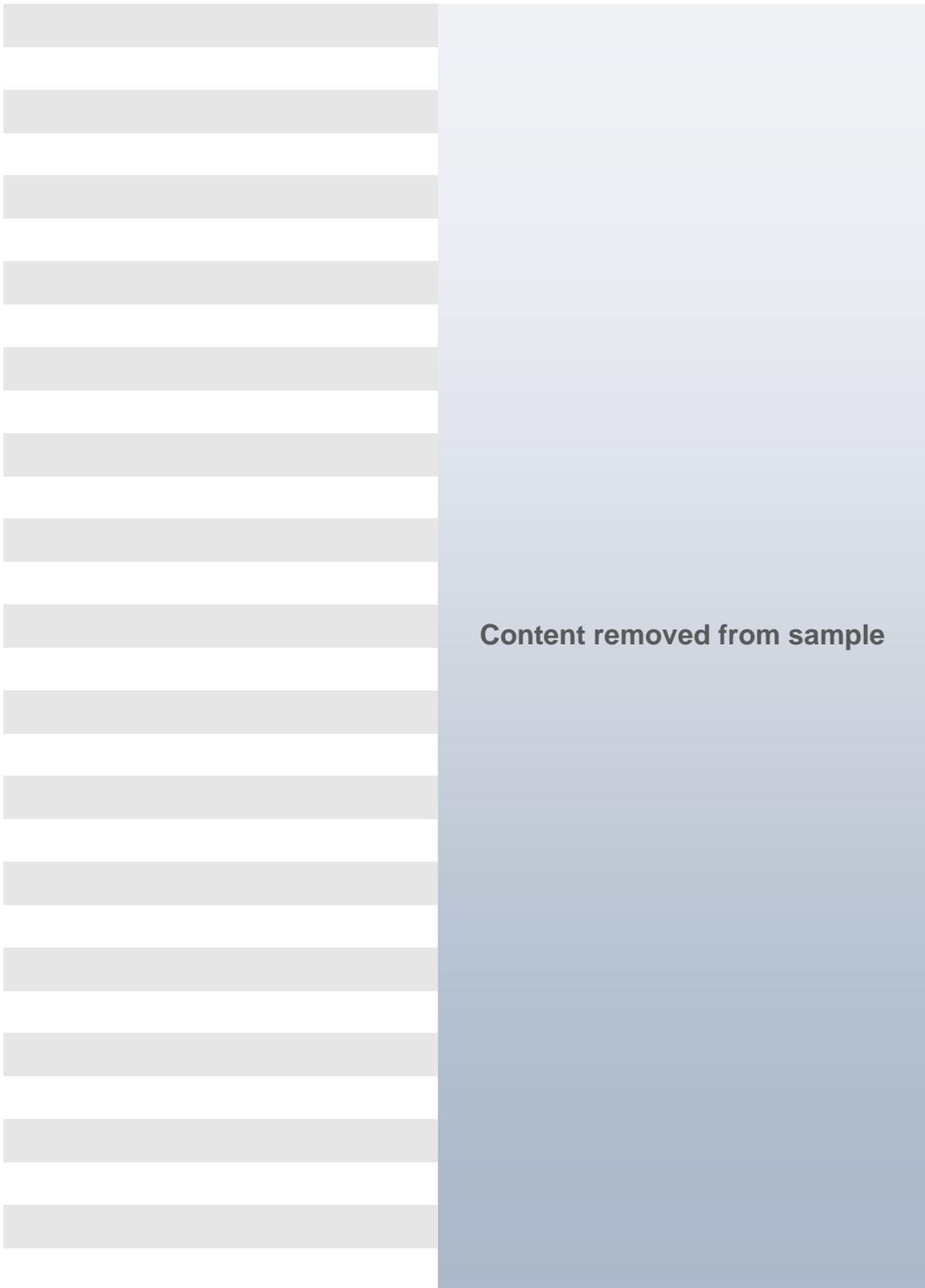
Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press





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Source: Euromonitor International