

Beauty and Personal Care in Austria

June 2025

Table of Contents

Beauty and Personal Care in Austria

EXECUTIVE SUMMARY

Beauty and personal care in 2024: The big picture 2024 key trends Competitive landscape Retail developments What next for beauty and personal care?

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2019-2024
Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2019-2024
Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2020-2024
Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2020-2024
Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2021-2024
Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2019-2024
Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2019-2024
Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2024
Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2024-2029
Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Innovation and evolving formulations support category growth despite low birth rates Branded leaders and private label both drive competition Supermarkets and health stores support strong distribution while e-commerce evolves

PROSPECTS AND OPPORTUNITIES

Demand for baby and child-specific products remains stable despite low birth rates Premium baby care retains its niche appeal through trust and brand heritage Innovation will focus on clean label formulations and sustainable materials

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2019-2024
Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2019-2024
Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2019-2024
Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2020-2024
Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2021-2024
Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2021-2024
Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2021-2024
Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2021-2024
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2024-2029
Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value 2024-2029
Table 21 - Forecast Sales of Baby and Child-specific Products by Category: % Value 2024-2029

Bath and Shower in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consumers maintain strong hygiene habits and seek sustainable options Leading players expand innovation and advertising to sustain relevance Multi-channel distribution evolves with digital innovation and hybrid models

PROSPECTS AND OPPORTUNITIES

Hygiene rituals and wellness routines to sustain consumer engagement Premium products to benefit from clean formulas and digital storytelling Innovation to focus on sustainability, clean labelling and experiential formats

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2019-2024

Table 23 - Sales of Bath and Shower by Category: % Value Growth 2019-2024

Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2019-2024

Table 25 - NBO Company Shares of Bath and Shower: % Value 2020-2024

Table 26 - LBN Brand Shares of Bath and Shower: % Value 2021-2024

Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2021-2024

Table 28 - Forecast Sales of Bath and Shower by Category: Value 2024-2029

 Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2024-2029

Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2024-2029

Colour Cosmetics in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Social media visibility, skinification and premium lip gloss fuelled rising interest L'Oréal led the market with strong brand portfolio and innovative advertising strategies Beauty specialists and e-commerce drove growth with elevated experiences and convenience

PROSPECTS AND OPPORTUNITIES

Innovations and evolving product expectations will shape colour cosmetics Premium colour cosmetics will outperform mass through elevated branding and experiential appeal Sustainability and formulation transparency will drive innovation in colour cosmetics

CATEGORY DATA

- Table 31 Sales of Colour Cosmetics by Category: Value 2019-2024
- Table 32 Sales of Colour Cosmetics by Category: % Value Growth 2019-2024
- Table 33 NBO Company Shares of Colour Cosmetics: % Value 2020-2024
- Table 34 LBN Brand Shares of Colour Cosmetics: % Value 2021-2024
- Table 35 LBN Brand Shares of Eye Make-up: % Value 2021-2024
- Table 36 LBN Brand Shares of Facial Make-up: % Value 2021-2024
- Table 37 LBN Brand Shares of Lip Products: % Value 2021-2024
- Table 38 LBN Brand Shares of Nail Products: % Value 2021-2024
- Table 39 LBN Brand Shares of Premium Colour Cosmetics: % Value 2021-2024
- Table 40 Forecast Sales of Colour Cosmetics by Category: Value 2024-2029
- Table 41 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2024-2029

Deodorants in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Natural formulations and consumer interest in clean ingredients supported growth Trusted brands and private label drove competition in an evolving market Widespread access and innovation in delivery supported strong retail performance

PROSPECTS AND OPPORTUNITIES

Consumer focus on clean ingredients and strong protection will shape product demand Premium deodorants to see modest growth as consumers weigh value and ethics Sustainability and functional innovation to underpin product development

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2019-2024Table 43 - Sales of Deodorants by Category: % Value Growth 2019-2024Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2019-2024Table 45 - NBO Company Shares of Deodorants: % Value 2020-2024Table 46 - LBN Brand Shares of Deodorants: % Value 2021-2024Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2021-2024Table 48 - Forecast Sales of Deodorants by Category: Value 2024-2029Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2024-2029Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2024-2029

Depilatories in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sustainability and intimate care trends support stable performance in a small category Trusted brand leadership meets rising private label momentum Health and personal care stores remain dominant as new formats emerge

PROSPECTS AND OPPORTUNITIES

Hair removal will remain a staple of beauty routines, supporting steady growth in value sales Professional-grade results at home will shape the next wave of product development Sustainability and skin sensitivity will drive innovation across formats

CATEGORY DATA

- Table 51 Sales of Depilatories by Category: Value 2019-2024
- Table 52 Sales of Depilatories by Category: % Value Growth 2019-2024
- Table 53 Sales of Women's Razors and Blades by Type: % Value Breakdown 2020-2024
- Table 54 NBO Company Shares of Depilatories: % Value 2020-2024
- Table 55 LBN Brand Shares of Depilatories: % Value 2021-2024
- Table 56 Forecast Sales of Depilatories by Category: Value 2024-2029
- Table 57 Forecast Sales of Depilatories by Category: % Value Growth 2024-2029

Fragrances in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Diverse consumer tastes and mass fragrances supported steady growth in 2024 Coty maintained leadership through a diverse portfolio and brand innovation Retailers enhanced physical and digital access to fragrance, fuelling category expansion

PROSPECTS AND OPPORTUNITIES

Sustained interest in fragrances will be supported by innovation, advertising and growing user base Premium fragrances will outperform mass offerings through pricing, exclusivity and niche appeal Product innovation, intense elixirs and refillable formats will shape future growth

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2019-2024 Table 59 - Sales of Fragrances by Category: % Value Growth 2019-2024 Table 60 - NBO Company Shares of Fragrances: % Value 2020-2024 Table 61 - LBN Brand Shares of Fragrances: % Value 2021-2024 Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2021-2024 Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2021-2024 Table 64 - Forecast Sales of Fragrances by Category: Value 2024-2029 Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2024-2029

Hair Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Skinification, sustainability, and science-backed claims shape consumer preferences in 2024 Henkel retains a commanding lead while dermocosmetics brands gain momentum Health and personal care stores remain dominant as omnichannel innovation boosts e-commerce

PROSPECTS AND OPPORTUNITIES

Medicated and problem-solving formulations to gain further traction Premium positioning will grow but mass hair care remains dominant Sustainability and skinification to shape future innovation

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2019-2024
Table 67 - Sales of Hair Care by Category: % Value Growth 2019-2024
Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2019-2024
Table 69 - NBO Company Shares of Hair Care: % Value 2020-2024
Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2020-2024
Table 71 - LBN Brand Shares of Hair Care: % Value 2021-2024
Table 72 - LBN Brand Shares of Colourants: % Value 2021-2024
Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2021-2024
Table 74 - LBN Brand Shares of Styling Agents: % Value 2021-2024
Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2021-2024
Table 76 - Forecast Sales of Hair Care by Category: Value 2024-2029
Table 77 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2024-2029

Men's Grooming in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Men increasingly engage with grooming routines, boosting demand for multifunctional and sports-aligned products Trusted legacy brands and value-led private label brands shape Austria's competitive landscape Health and personal care stores retain shopper loyalty while new e-commerce concepts drive digital growth

PROSPECTS AND OPPORTUNITIES

Men's personal care engagement is set to deepen through wellness, routine, and visibility Premium grooming to expand modestly, anchored by ingredient quality and celebrity appeal Innovation to focus on multifunctionality, sustainable formats, and enhanced performance

CATEGORY DATA

- Table 79 Sales of Men's Grooming by Category: Value 2019-2024Table 80 Sales of Men's Grooming by Category: % Value Growth 2019-2024Table 81 Sales of Men's Razors and Blades by Type: % Value Breakdown 2021-2024Table 82 Sales of Men's Skin Care by Type: % Value Breakdown 2021-2024Table 83 NBO Company Shares of Men's Grooming: % Value 2020-2024Table 84 LBN Brand Shares of Men's Grooming: % Value 2021-2024Table 85 LBN Brand Shares of Men's Razors and Blades: % Value 2021-2024Table 86 Forecast Sales of Men's Grooming by Category: Value 2024-2029
- Table 87 Forecast Sales of Men's Grooming by Category: % Value Growth 2024-2029

Oral Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising oral health awareness and functional product demand drive growth Brand heritage and private label innovation shape the competitive landscape Health and personal care stores remain dominant while e-commerce grows from a low base

PROSPECTS AND OPPORTUNITIES

Health-driven habits and whitening trends will support steady growth Competition in toothpaste remains fierce amid functional and premium demand Ingredient transparency and innovation to reshape product development

CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2019-2024 Table 89 - Sales of Oral Care by Category: % Value Growth 2019-2024 Table 90 - Sales of Toothbrushes by Category: Value 2019-2024 Table 91 - Sales of Toothbrushes by Category: % Value Growth 2019-2024 Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2020-2024 Table 93 - NBO Company Shares of Oral Care: % Value 2020-2024 Table 94 - LBN Brand Shares of Oral Care: % Value 2021-2024 Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2021-2024 Table 96 - LBN Brand Shares of Toothpaste: % Value 2021-2024 Table 97 - Forecast Sales of Oral Care by Category: Value 2024-2029 Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2024-2029 Table 99 - Forecast Sales of Toothbrushes by Category: Value 2024-2029 Table 99 - Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029 Table 99 - Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029

Skin Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consumer interest in skin barrier health and k-beauty supports strong value sales growth Private label appeal and low-price strategy drive dynamic growth for dm-Drogerie Markt Health and personal care stores remain dominant, while e-commerce continues to gain ground

PROSPECTS AND OPPORTUNITIES

Strong demand for facial care and premium innovation expected to sustain growth Premium skin care to outpace mass brands, led by facial care innovations Innovation focused on ingredients, multifunctionality, and sustainability

CATEGORY DATA

Table 101 - Sales of Skin Care by Category: Value 2019-2024Table 102 - Sales of Skin Care by Category: % Value Growth 2019-2024Table 103 - NBO Company Shares of Skin Care: % Value 2020-2024Table 104 - LBN Brand Shares of Skin Care: % Value 2021-2024Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2021-2024Table 106 - LBN Brand Shares of Anti-agers: % Value 2021-2024Table 107 - LBN Brand Shares of Firming Body Care: % Value 2021-2024Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2021-2024Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2021-2024Table 109 - LBN Brand Shares of Skin Care by Category: Value 2021-2024Table 110 - Forecast Sales of Skin Care by Category: % Value Covert 2024-2029Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2024-2029

Sun Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Strong growth fuelled by rising demand and premiumisation in sun protection Beiersdorf remains the undisputed leader while L'Oréal gains ground through dermocosmetic innovation Health and personal care stores dominate, while pharmacies and e-commerce channels gain momentum

PROSPECTS AND OPPORTUNITIES

Ongoing consumer awareness and skinification to sustain strong demand for sun protection Premium dermocosmetics to drive fastest growth across sun care Sustainable and skin-caring innovations to define the next wave of product development

CATEGORY DATA

Table 112 - Sales of Sun Care by Category: Value 2019-2024Table 113 - Sales of Sun Care by Category: % Value Growth 2019-2024Table 114 - NBO Company Shares of Sun Care: % Value 2020-2024Table 115 - LBN Brand Shares of Sun Care: % Value 2021-2024Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2021-2024Table 117 - Forecast Sales of Sun Care by Category: Value 2024-2029Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2024-2029

Premium Beauty and Personal Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Premium beauty and personal care growth tempered by price sensitivity and rising competition L'Oréal strengthens lead through broad premium portfolio and strategic investment Price sensitivity leads to downtrading, though premiumisation continues in niche areas

PROSPECTS AND OPPORTUNITIES

Premium beauty and personal care set to maintain steady growth momentum Premium lipstick set to lead growth with innovation and celebrity influence Sustainability and innovation to drive packaging evolution and product launches

CATEGORY DATA

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2019-2024Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2019-2024Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2020-2024

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2021-2024Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2024-2029Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2024-2029

Mass Beauty and Personal Care in Austria

KEY DATA FINDINGS

2024 DEVELOPMENTS

Downtrading drives growth in mass beauty and personal care as consumers seek affordable quality Sustainability, innovation and affordability define the competitive landscape in 2024 Affordability, quality, and premium positioning drive consumer loyalty to mass beauty and personal care

PROSPECTS AND OPPORTUNITIES

Mass beauty and personal care remains dominant but faces growing competition from premiumisation and private label brands Interest in mass skin care and body mists grows, while self-tanning loses appeal Sustainability and packaging innovation become key areas of investment

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2019-2024

 Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2020-2024

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2021-2024

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2024-2029

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-austria/report.