



# Henkel AG & Co KGaA in Beauty and Personal Care

October 2022

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## STATE OF PLAY

Henkel remains in 13th place in beauty and personal care

Europe accounts for more than half of Henkel's global sales in 2021

Hair care dominates Henkel's beauty and personal care sales

Targeted acquisitions might serve to make Henkel a more competitive entity

Henkel brings forward its climate-positive production goals to 2030

Henkel Consumer Brands expected to be up and running by the start of 2023

Henkel dx Hub innovation centres to drive digital transformation and create digital solutions

## EXPOSURE TO FUTURE GROWTH

Greatest growth for Henkel expected in hair care in China and Germany

Limited expectations for Henkel to improve its 13th position in global BPC

Euromonitor's latest 2022 projections forecast downgrades across key beauty markets

Rising inflation rates a growing concern that call for pivots in positioning and marketing

## COMPETITIVE POSITIONING

Henkel's share back in decline in 2021 after the year-earlier pandemic-related sales boost

Henkel sees declining overlaps with Shiseido and Coty

Henkel a top three company globally in both colourants and styling agents

House of Schwarzkopf spearheads the hair care brand's digitalisation drive

Henkel taps into the clean beauty trend with natural products and ingredients

Consumer perceptions of top Henkel brands

Ukraine war sees Henkel quit Russia, its fifth biggest BPC market

## HAIR CARE

Hair care dominates Henkel's BPC sales

China offers potential in salon professional hair care

China and Germany will drive actual sales growth in Henkel's hair care business

Strut like a peacock or rise like a phoenix from the ashes with the COLOUR ALCHEMY range

Authentic Beauty Concept new-generation Refill Bars help close the circular economy

## BATH AND SHOWER

US is Henkel's biggest bath and shower market

Body wash/shower gel dominates sales in most of Henkel's top 10 markets

US dominates new sales for Henkel in bath and shower

## KEY FINDINGS

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## APPENDIX

Overview of Beauty Survey: Product and brand coverage

Overview of Beauty Survey

Projected company sales: FAQs (1/2)

Projected company sales: FAQs (2/2)

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