



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

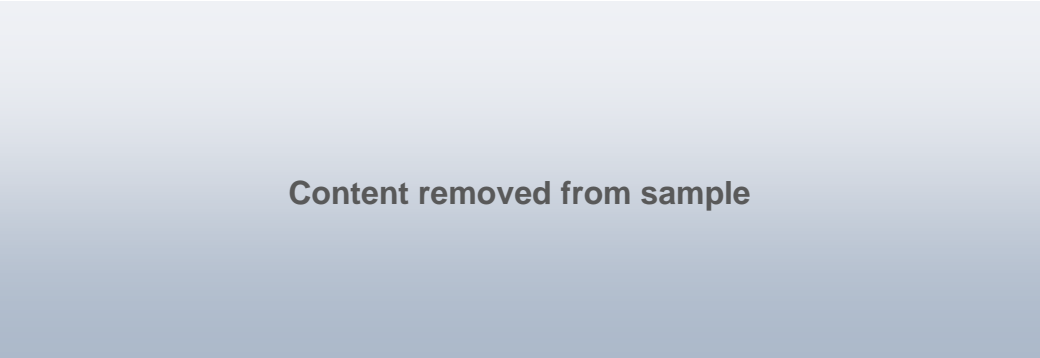
Prices continue to rise in baby and child-specific products

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Product innovation supports value growth

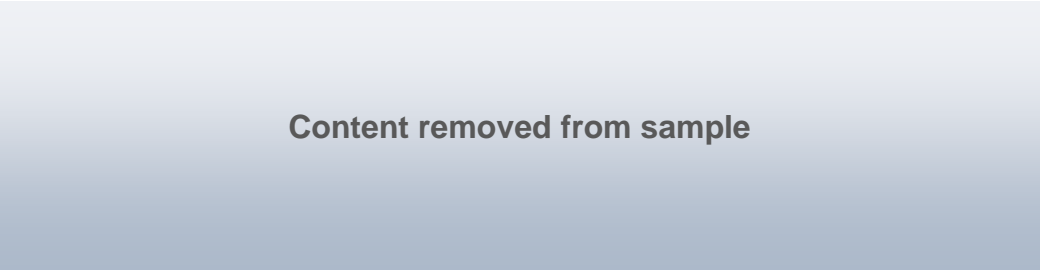
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Procter & gamble austria strengthens its lead

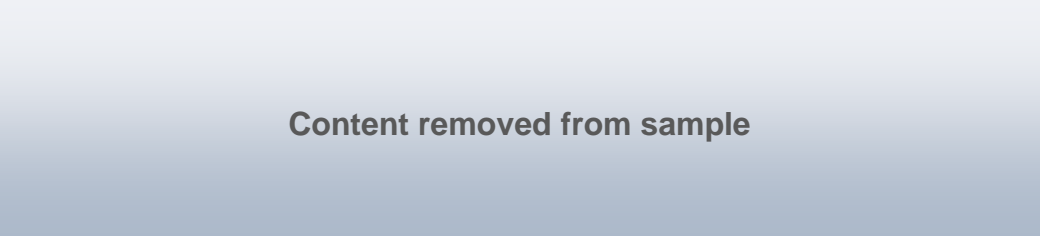


PROSPECTS AND OPPORTUNITIES

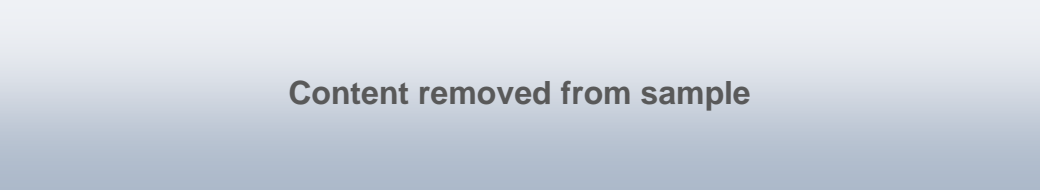
Steady pace of growth in volume and value terms



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

Data removed from sample

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

Data removed from sample

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

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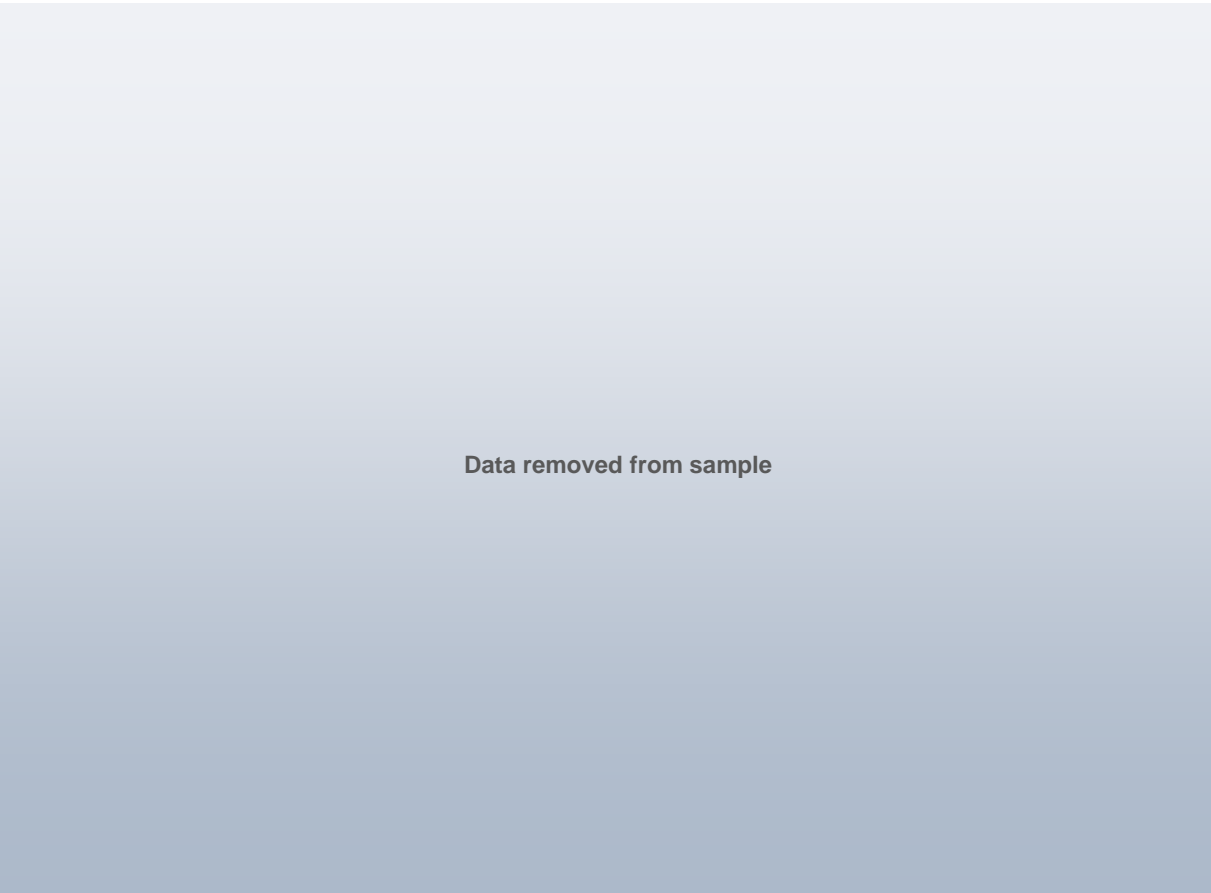
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% retail value rsp
Company

2019 2020 2021 2022 2023

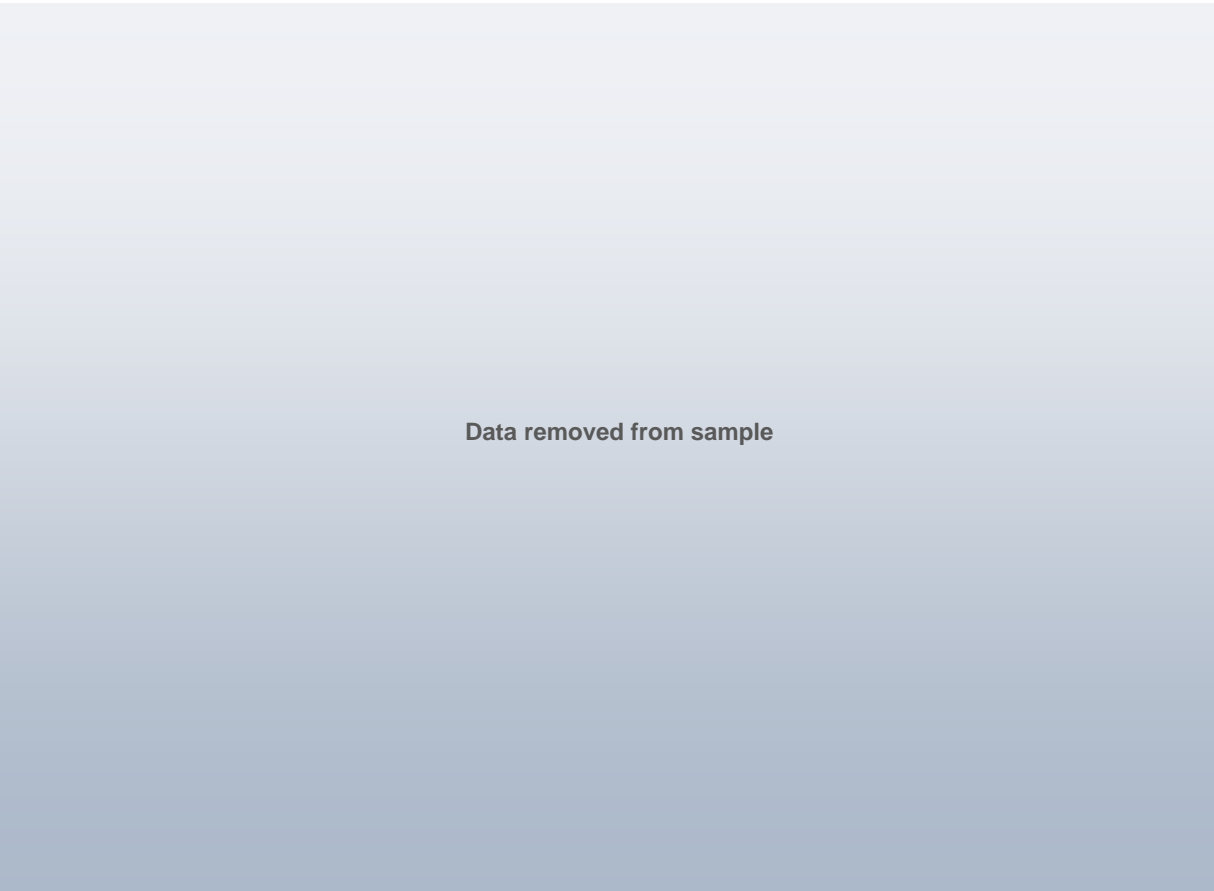
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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
Data removed from sample					



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
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

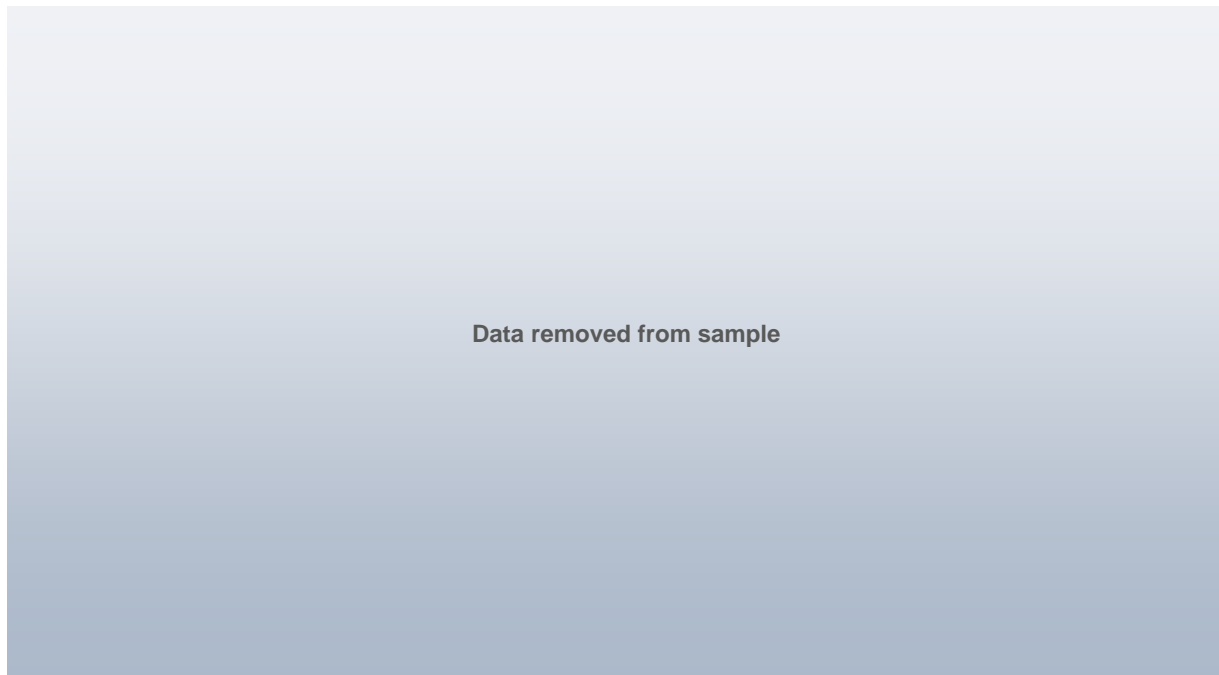
Table 7 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

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

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2023 key trends

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Competitive landscape

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Retailing developments

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What next for beauty and personal care?

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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

Data removed from sample

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

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

Data removed from sample

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
 - 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

Data removed from sample

- 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

Data removed from sample

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

Data removed from sample

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

Data removed from sample

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:

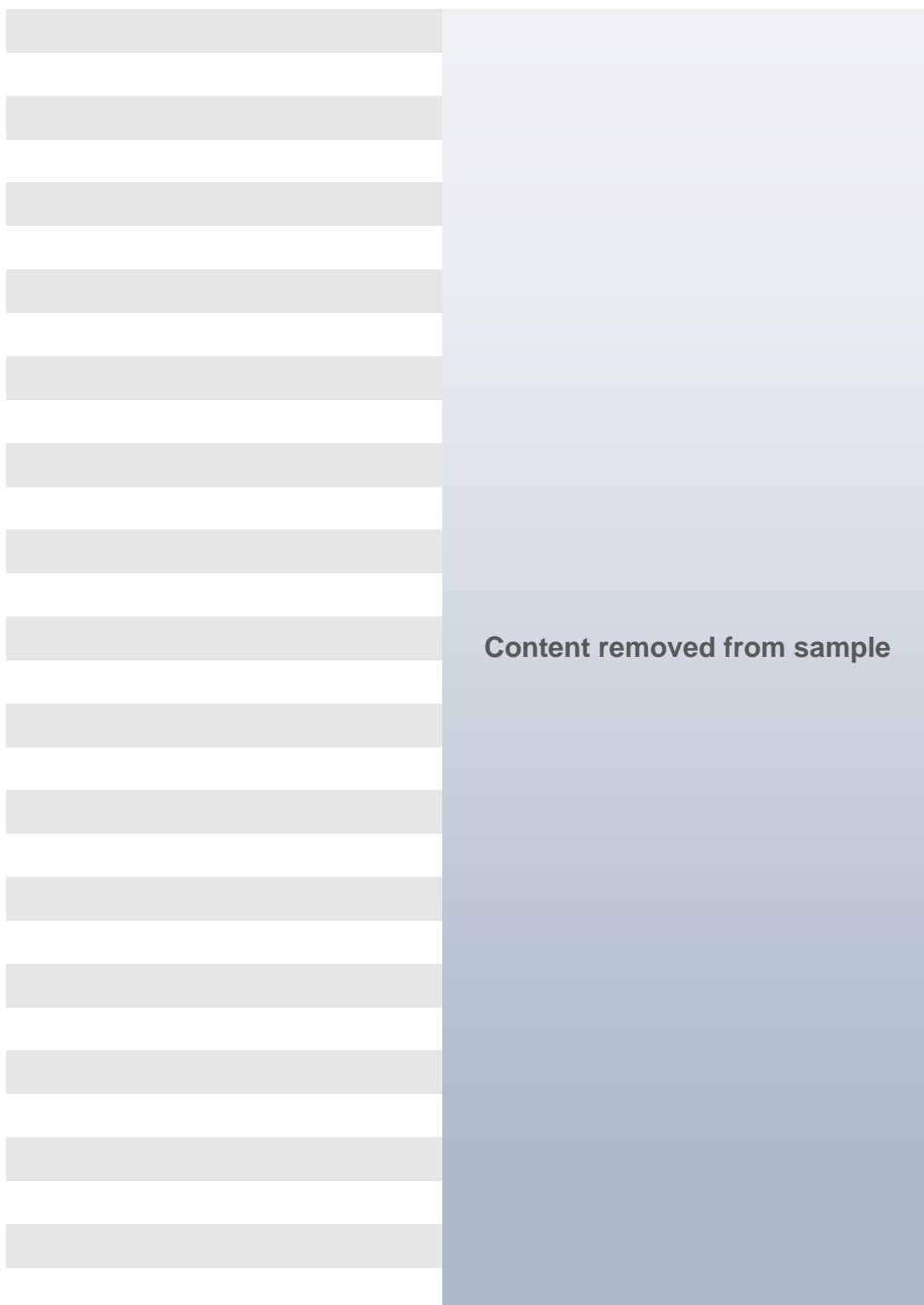
Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

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Source: Euromonitor International