



Passport

Premium Beauty and Personal Care in Canada

Euromonitor International

May 2022

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Some content and data have been changed.

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PREMIUM BEAUTY AND PERSONAL CARE IN CANADA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Lifting of pandemic-relations restrictions and reopening of beauty specialist retailers benefits sales of premium products in 2021

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Despite challenging conditions, premium brands and retailers expand their store network in Canada

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L'Oréal worth its lead thanks to its strong portfolio of premium brands

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PROSPECTS AND OPPORTUNITIES

Rise in disposable incomes will boost sales in premium beauty and personal care over the forecast period

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Premium hair care set to benefit from the “skinification of hair” trend

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Sustained momentum in digital engagement

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CATEGORY DATA

Table 1 Sales of Premium Beauty and Personal Care by Category: Value 2016-2021

CAD million	2016	2017	2018	2019	2020	2021
Premium Baby and Child-specific Products	Data removed from sample					
Premium Bath and Shower						
Premium Colour Cosmetics						
- Premium Eye Make-Up						
- Premium Facial Make-Up						
- Premium Lip Products						
- Premium Nail Products						
- Premium Colour Cosmetics Sets/Kits						
Premium Deodorants						
Premium Fragrances						
- Premium Men's Fragrances						
- Premium Women's Fragrances						
- Premium Unisex Fragrances						
- Premium Fragrance Sets/Kits						
Premium Hair Care						
Premium Skin Care						
- Premium Body Care						
- Premium Facial Care						
- Premium Hand Care						
- Premium Skin Care Sets/Kits						
Premium Adult Sun Care						
- Premium Aftersun						
- Premium Self-Tanning						
- Premium Sun Protection						
Premium Beauty and Personal Care						

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

Note: Premium 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

Table 2 Sales of Premium Beauty and Personal Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Premium Baby and Child-specific Products	Data removed from sample		
Premium Bath and Shower			
Premium Colour Cosmetics			

- Premium Eye Make-Up
- Premium Facial Make-Up
- Premium Lip Products
- Premium Nail Products
- Premium Colour Cosmetics Sets/Kits
- Premium Deodorants
- Premium Fragrances
- Premium Men's Fragrances
- Premium Women's Fragrances
- Premium Unisex Fragrances
- Premium Fragrance Sets/Kits
- Premium Hair Care
- Premium Skin Care
- Premium Body Care
- Premium Facial Care
- Premium Hand Care
- Premium Skin Care Sets/Kits
- Premium Adult Sun Care
- Premium Aftersun
- Premium Self-Tanning
- Premium Sun Protection
- Premium 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: Premium 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

Table 3 NBO Company Shares of Premium Beauty and Personal Care: % Value 2017-2021

% retail value rsp					
Company	2017	2018	2019	2020	2021

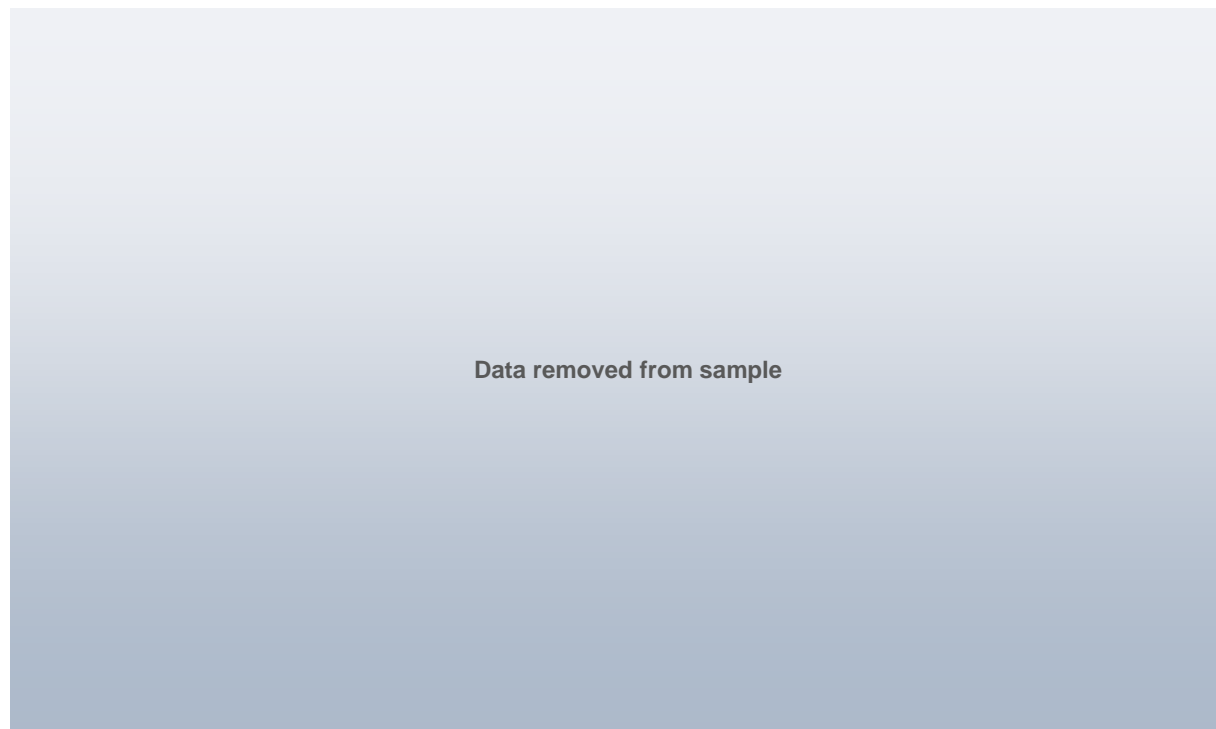
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 LBN Brand Shares of Premium Beauty and Personal Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					



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

Table 5 Forecast Sales of Premium Beauty and Personal Care by Category: Value
2021-2026

CAD million

	2021	2022	2023	2024	2025	2026
Premium Baby and Child-specific Products	Data removed from sample					
Premium Bath and Shower						
Premium Colour Cosmetics						
- Premium Eye Make-Up						
- Premium Facial Make-Up						
- Premium Lip Products						
- Premium Nail Products						
- Premium Colour Cosmetics Sets/Kits						
Premium Deodorants						
Premium Fragrances						
- Premium Men's Fragrances						
- Premium Women's Fragrances						
- Premium Unisex Fragrances						
- Premium Fragrance Sets/Kits						
Premium Hair Care						
Premium Skin Care						
- Premium Body Care						
- Premium Facial Care						

- Premium Hand Care
 - Premium Skin Care
 Sets/Kits
 Premium Adult Sun Care
 - Premium Aftersun
 - Premium Self-Tanning
 - Premium Sun Protection
 Premium Beauty and
 Personal Care

Data removed from sample

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

Note: Premium 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

Table 6 Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2021-2026

% constant value growth

2021/2022

2021-26 CAGR

2021/26 Total

Premium Baby and Child-specific Products
 Premium Bath and Shower
 Premium Colour Cosmetics
 - Premium Eye Make-Up
 - Premium Facial Make-Up
 - Premium Lip Products
 - Premium Nail Products
 - Premium Colour Cosmetics Sets/Kits
 Premium Deodorants
 Premium Fragrances
 - Premium Men's Fragrances
 - Premium Women's Fragrances
 - Premium Unisex Fragrances
 - Premium Fragrance Sets/Kits
 Premium Hair Care
 Premium Skin Care
 - Premium Body Care
 - Premium Facial Care
 - Premium Hand Care
 - Premium Skin Care Sets/Kits
 Premium Adult Sun Care
 - Premium Aftersun
 - Premium Self-Tanning
 - Premium Sun Protection
 Premium Beauty and Personal Care

Data removed from sample

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

Note: Premium 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

BEAUTY AND PERSONAL CARE IN CANADA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Beauty and personal care in 2021: The big picture

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2021 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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Chart 1 Beauty and Personal Care Value Sales Growth Scenarios: 2019-2026

Retail Value Sales, Real, US\$ mn, 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Beauty and Personal Care - Canada

Passport Baseline C19 Pessimistic



Source: Euromonitor International

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

Chart 2 Beauty and Personal Care Impact of Soft Drivers on Value Sales: 2019-2026

Retail Value Sales, Real US\$ mn 2019 - 2026

2021 Constant Prices, 2021 Fixed Year Exchange Rate

Canada - Beauty and Personal Care**Retail Value Sales, Real Growth**

○ Passport Baseline

Driver effects

■ GDP Per Capita

■ Product Price

■ Habit Persistence

■ Population

■ Socio-Economic Trends

(Female Employment Rate; Share of Economically Active Women Ages 15-34)

■ Market Environment

(Beauty Specialist Retailers, Department Stores Outlets; Business Arrivals)

■ Soft Drivers

(- Competition; - Maturity of sector; - Promotion; + Availability; + Product variety)



Source: Euromonitor International

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

MARKET DATA**Table 7 Sales of Beauty and Personal Care by Category: Value 2016-2021**

CAD million

	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products	Data removed from sample					
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						
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

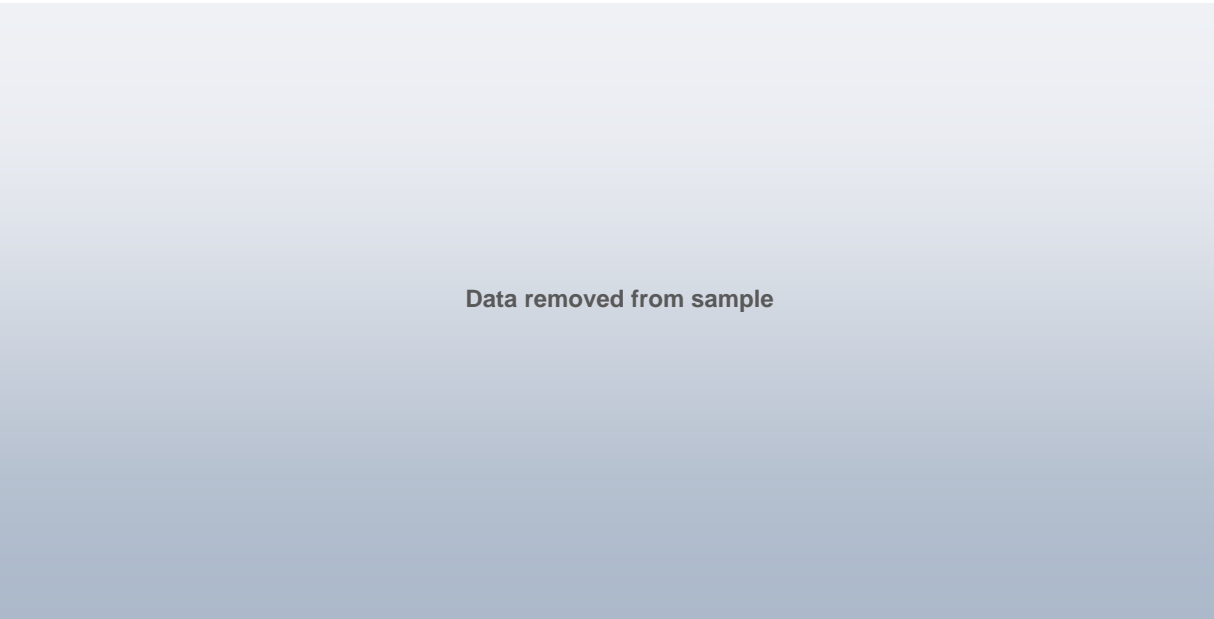
Table 8 Sales of Beauty and Personal Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baby and Child-specific Products	Data removed from sample		
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			
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 9 GBO Company Shares of Beauty and Personal Care: % Value 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				



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

Table 10 NBO Company Shares of Beauty and Personal Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
Data removed from sample					

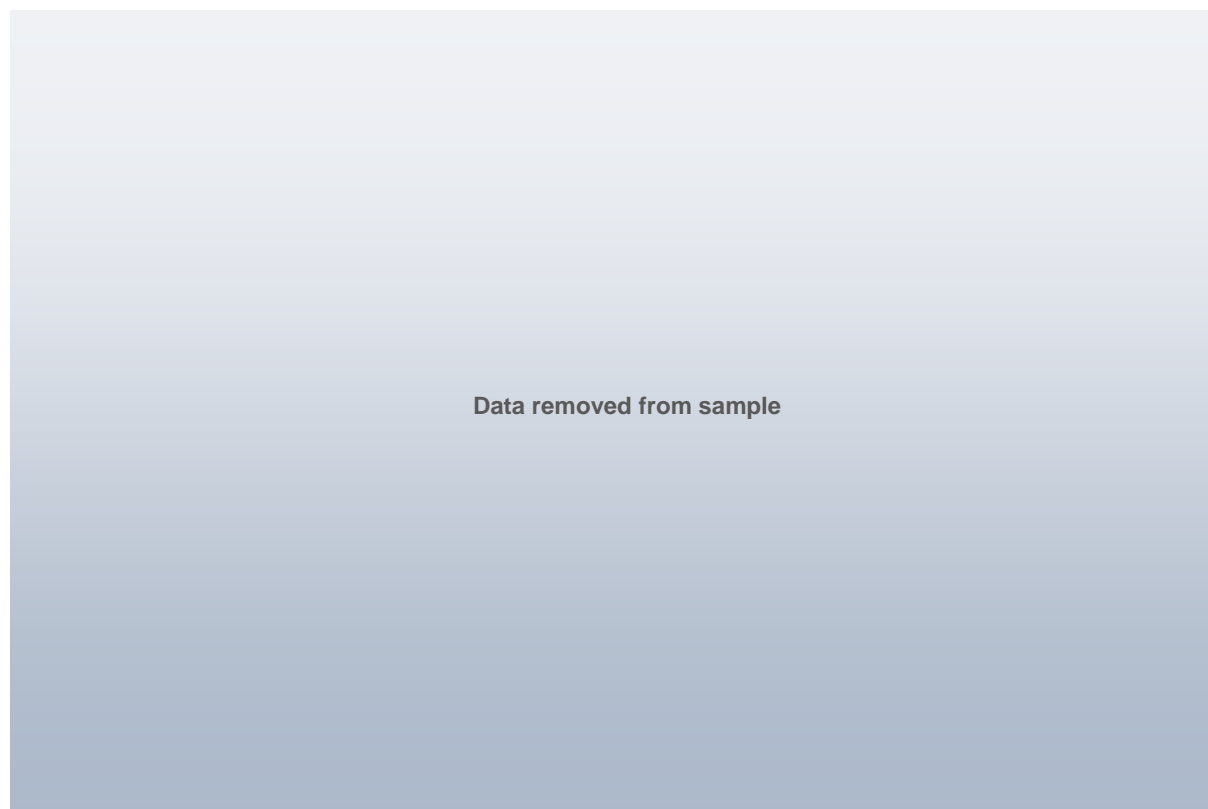
Table 10

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

Table 11 LBN Brand Shares of Beauty and Personal Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					



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

Table 12 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products	Data removed from sample					
Bath and Shower						
Beauty and Personal Care						
Colour Cosmetics						
Deodorants						
Depilatories						
Hair Care						
Mass Beauty and Personal Care						
Men's Grooming						
Oral Care						
Skin Care						
Sun Care						

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

Table 13 Distribution of Beauty and Personal Care by Format: % Value 2016-2021



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

Table 14 Distribution of Beauty and Personal Care by Format and Category: % Value 2021

% retail value rsp						
	Baby and	Bath and	Colour Cosmetics	Deodorants	Depilatories	Fragrances



--- Forecourt Retailers
 --- Hypermarkets
 --- Supermarkets
 -- Traditional Grocery Retailers
 - Non-Grocery Specialists
 -- Apparel and Footwear Specialists
 -- Appliances and Electronics Specialists
 -- Health and Beauty Specialist
 --- Beauty Specialists
 --- Chemists/Pharmacies
 --- Drugstores/parapharmacies
 --- Other BPC Health and Beauty Specialist Retailers
 -- Home and Garden Specialist Retailers
 --- Homewares and Home Furnishing Stores
 -- Other Non-Grocery Retailers
 --- Outdoor Markets
 --- Other BPC Non-Grocery Specialists
 - Mixed Retailers
 -- Department Stores
 -- Mass Merchandisers
 -- Variety Stores
 -- Warehouse Clubs
 Non-Store Retailing
 - Direct Selling
 - Homeshopping
 - E-Commerce
 - Vending
 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 15 Forecast Sales of Beauty and Personal Care by Category: Value 2021-2026

CAD million

2021 2022 2023 2024 2025 2026

Baby and Child-specific Products
 Bath and Shower
 Colour Cosmetics
 Deodorants
 Depilatories
 Fragrances

Data removed from sample

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
 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

Table 16 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

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
 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: 11 April 2022

Report closing date: 17 May 2022

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 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