

Beauty and Personal Care in Australia

<https://marketpublishers.com/r/BDBFA90B58CEN.html>

Date: June 2023

Pages: 131

Price: US\$ 2,650.00 (Single User License)

ID: BDBFA90B58CEN

Abstracts

Rising costs and squeezed household budgets in 2022 resulted in Australians reconsidering their spending habits, with many trading down to more affordable options and being more selective with their expenditure, whilst still giving themselves permission to indulge. Players responded with promotions, new products and formats, while retailers launched private label and price-accessible exclusive ranges. For example, online beauty specialist Adore Beauty launched Viviology and AB LAB in 2022, with...

Euromonitor International's Beauty and Personal Care in Australia report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2018-2022, allowing you to identify the sectors driving growth. Forecasts to 2027 illustrate how the market is set to change.

Product coverage: Baby and Child-specific Products, Bath and Shower, Colour Cosmetics, Deodorants, Depilatories, Dermocosmetics Beauty and Personal Care, Fragrances, Hair Care, Mass Beauty and Personal Care, Men's Grooming, Oral Care, Oral Care Excl Power Toothbrushes, Premium Beauty and Personal Care, Prestige Beauty and Personal Care, Skin Care, Sun Care.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

Get a detailed picture of the Beauty and Personal Care market;

Pinpoint growth sectors and identify factors driving change;

Understand the competitive environment, the market's major players and leading brands;

Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Contents

BEAUTY AND PERSONAL CARE IN AUSTRALIA

EXECUTIVE SUMMARY

Beauty and personal care in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

MARKET DATA

Table 1 Sales of Beauty and Personal Care by Category: Value 2017-2022

Table 2 Sales of Beauty and Personal Care by Category: % Value Growth 2017-2022

Table 3 GBO Company Shares of Beauty and Personal Care: % Value 2018-2022

Table 4 NBO Company Shares of Beauty and Personal Care: % Value 2018-2022

Table 5 LBN Brand Shares of Beauty and Personal Care: % Value 2019-2022

Table 6 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2017-2022

Table 7 Forecast Sales of Beauty and Personal Care by Category: Value 2022-2027

Table 8 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 Research Sources

MASS BEAUTY AND PERSONAL CARE IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Strong growth for mass segment as Australians look to control spending in 2022

Players expand distribution to reach wider audience

Players pay greater attention to environmental and social trends

PROSPECTS AND OPPORTUNITIES

Sustainability likely to be an enduring trend

Mass brands need to address increasing demand for clean and local products

Challenges and opportunities from the digital world

CATEGORY DATA

Table 9 Sales of Mass Beauty and Personal Care by Category: Value 2017-2022

Table 10 Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022

Table 11 NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022

Table 12 LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022

Table 13 Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027

Table 14 Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2022-2027

PREMIUM BEAUTY AND PERSONAL CARE IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Beauty specialists enjoy rising demand and invest in experiential retail

Easing of travel restrictions supports rising sales in 2022

Sustainability concerns encourage players to focus on alternative packaging solutions

PROSPECTS AND OPPORTUNITIES

Players must avoid greenwashing as they look to appeal to eco-conscious consumers

Adopting viable omnichannel strategy, while rise in inbound tourism will encourage further investment in airport concessions

Australians to increasingly value combination of skin care and sun care

CATEGORY DATA

Table 15 Sales of Premium Beauty and Personal Care by Category: Value 2017-2022

Table 16 Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022

Table 17 NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022

Table 18 LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022

Table 19 Forecast Sales of Premium Beauty and Personal Care by Category: Value 2022-2027

Table 20 Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2022-2027

BABY AND CHILD-SPECIFIC PRODUCTS IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Local parents remain interested in safe but effective products for their children

Sustainable claims gradually emerge in baby and child-specific products

Brands look to expand target audience beyond initial positioning

PROSPECTS AND OPPORTUNITIES

Sustainability and natural claims will remain a key strategy for players

Steady growth over forecast period, supported by innovation and more sophisticated formulations

E-commerce set to further penetrate category but offline experiential retail will remain

relevant

CATEGORY DATA

Table 21 Sales of Baby and Child-specific Products by Category: Value 2017-2022

Table 22 Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022

Table 23 Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022

Table 24 NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022

Table 25 LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022

Table 26 LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022

Table 27 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022

Table 28 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022

Table 29 Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027

Table 30 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027

Table 31 Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

BATH AND SHOWER IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Bath and shower players focus on natural claims and targeting Generation Z

Intensifying competition as Australians return to more sophisticated bathing routines

Brands look to improve consumer engagement with different strategies

PROSPECTS AND OPPORTUNITIES

Bath and shower set for overall positive performance over forecast period

Players look to sustainable packaging and formats

Targeting younger generations with clean positioning key to adding value

CATEGORY DATA

Table 32 Sales of Bath and Shower by Category: Value 2017-2022

Table 33 Sales of Bath and Shower by Category: % Value Growth 2017-2022

Table 34 Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022

Table 35 NBO Company Shares of Bath and Shower: % Value 2018-2022

Table 36 LBN Brand Shares of Bath and Shower: % Value 2019-2022

Table 37 LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022

Table 38 Forecast Sales of Bath and Shower by Category: Value 2022-2027

Table 39 Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027

Table 40 Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027**COLOUR COSMETICS IN AUSTRALIA****KEY DATA FINDINGS****2022 DEVELOPMENTS**

Greater mobility drives up stronger demand for colour cosmetics in 2022

Experiential beauty retail remains key trend in 2022

Frequent socialising and natural look drive demand for eye make-up in 2022

PROSPECTS AND OPPORTUNITIES

Sustainability initiatives likely to emerge more strongly in the coming years

Digital sales and marketing likely to be further explored by brands and retailers

Local consumers to simplify beauty routines to address increasingly hectic lifestyles

CATEGORY DATA

Table 41 Sales of Colour Cosmetics by Category: Value 2017-2022

Table 42 Sales of Colour Cosmetics by Category: % Value Growth 2017-2022

Table 43 NBO Company Shares of Colour Cosmetics: % Value 2018-2022

Table 44 LBN Brand Shares of Colour Cosmetics: % Value 2019-2022

Table 45 LBN Brand Shares of Eye Make-up: % Value 2019-2022

Table 46 LBN Brand Shares of Facial Make-up: % Value 2019-2022

Table 47 LBN Brand Shares of Lip Products: % Value 2019-2022

Table 48 LBN Brand Shares of Nail Products: % Value 2019-2022

Table 49 LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022

Table 50 Forecast Sales of Colour Cosmetics by Category: Value 2022-2027

Table 51 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

DEODORANTS IN AUSTRALIA**KEY DATA FINDINGS****2022 DEVELOPMENTS**

Mature deodorants continues to evolve with focus on different claims

Greater interest in natural products influences new development by independents

Increasing focus by players on communities and the environment

PROSPECTS AND OPPORTUNITIES

Sustainability trend set to increasingly influence category's development

Players must balance use of natural components with efficacy claims

Creating positive brand messaging to encompass all relevant trends and claims

CATEGORY DATA

Table 52 Sales of Deodorants by Category: Value 2017-2022

Table 53 Sales of Deodorants by Category: % Value Growth 2017-2022

Table 54 Sales of Deodorants by Premium vs Mass: % Value 2017-2022

Table 55 NBO Company Shares of Deodorants: % Value 2018-2022

Table 56 LBN Brand Shares of Deodorants: % Value 2019-2022

Table 57 LBN Brand Shares of Premium Deodorants: % Value 2019-2022

Table 58 Forecast Sales of Deodorants by Category: Value 2022-2027

Table 59 Forecast Sales of Deodorants by Category: % Value Growth 2022-2027

Table 60 Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

DEPILATORIES IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Falling demand for depilatories as consumers seek alternative methods of hair removal

Gillette Venus aims to open up discussion around intimate grooming

Brands increasingly look to skin care ingredients to add value to depilatories

PROSPECTS AND OPPORTUNITIES

Consumers expect depilatories to be multifunctional and offer greater value

Sustainability likely to gain momentum within depilatories to address consumers' concerns

Stable demand predicted for women's razors and blades over early part of forecast period but professional hair removal offers further competition

CATEGORY DATA

Table 61 Sales of Depilatories by Category: Value 2017-2022

Table 62 Sales of Depilatories by Category: % Value Growth 2017-2022

Table 63 Sales of Women's Razors and Blades by Type: % Value Breakdown 2018-2022

Table 64 NBO Company Shares of Depilatories: % Value 2018-2022

Table 65 LBN Brand Shares of Depilatories: % Value 2019-2022

Table 66 Forecast Sales of Depilatories by Category: Value 2022-2027

Table 67 Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

FRAGRANCES IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Recovery for fragrances in 2022 driven by premium segment

Localism gains further momentum in 2022

Inclusivity, gender fluidity and emotional appeal of fragrances

PROSPECTS AND OPPORTUNITIES

Positive outlook for fragrances, driven by indulgence trend and stronger return of inbound tourists

Local brands to increasingly focus on ethical and sustainable production

In-store testing will remain important for fragrances, despite high share for e-commerce

CATEGORY DATA

Table 68 Sales of Fragrances by Category: Value 2017-2022

Table 69 Sales of Fragrances by Category: % Value Growth 2017-2022

Table 70 NBO Company Shares of Fragrances: % Value 2018-2022

Table 71 LBN Brand Shares of Fragrances: % Value 2019-2022

Table 72 LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022

Table 73 LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022

Table 74 Forecast Sales of Fragrances by Category: Value 2022-2027

Table 75 Forecast Sales of Fragrances by Category: % Value Growth 2022-2027

HAIR CARE IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Greater focus on local hair care brands using natural ingredients

Sustainability concerns continue to drive purchasing decisions

Post-pandemic footfall encourages local retailer to expand offline presence

PROSPECTS AND OPPORTUNITIES

Skinification of hair care likely to continue influencing category development

Further exploration of sustainable ingredients and packaging expected in hair care

Salon professional hair care set for dynamic performance over forecast period

CATEGORY DATA

Table 76 Sales of Hair Care by Category: Value 2017-2022

Table 77 Sales of Hair Care by Category: % Value Growth 2017-2022

Table 78 Sales of Hair Care by Premium vs Mass: % Value 2017-2022

Table 79 NBO Company Shares of Hair Care: % Value 2018-2022

Table 80 NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022

Table 81 LBN Brand Shares of Hair Care: % Value 2019-2022

Table 82 LBN Brand Shares of Colourants: % Value 2019-2022

Table 83 LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022

Table 84 LBN Brand Shares of Styling Agents: % Value 2019-2022

Table 85 LBN Brand Shares of Premium Hair Care: % Value 2019-2022

Table 86 Forecast Sales of Hair Care by Category: Value 2022-2027

Table 87 Forecast Sales of Hair Care by Category: % Value Growth 2022-2027

Table 88 Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

MEN'S GROOMING IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Stable demand for men's grooming with new brands entering the competition

Local brands focus on supporting men's wider health issues

Retailers continue to expand private label lines to new categories

PROSPECTS AND OPPORTUNITIES

Men's grooming offers further potential to both local and international brands

E-commerce likely to gain further ground due to convenience and accessibility

Brands from different industries identify men's grooming as area of expansion

CATEGORY DATA

Table 89 Sales of Men's Grooming by Category: Value 2017-2022

Table 90 Sales of Men's Grooming by Category: % Value Growth 2017-2022

Table 91 Sales of Men's Razors and Blades by Type: % Value Breakdown 2019-2022

Table 92 Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022

Table 93 NBO Company Shares of Men's Grooming: % Value 2018-2022

Table 94 LBN Brand Shares of Men's Grooming: % Value 2019-2022

Table 95 LBN Brand Shares of Men's Razors and Blades: % Value 2019-2022

Table 96 Forecast Sales of Men's Grooming by Category: Value 2022-2027

Table 97 Forecast Sales of Men's Grooming by Category: % Value Growth 2022-2027

ORAL CARE IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Greater emphasis on appearance drives demand for whitening oral care options

Further dynamic growth for electric toothbrushes in 2022

Sustainability remains in the spotlight across most of oral care

PROSPECTS AND OPPORTUNITIES

Increasing competition likely among major distribution channels with stronger development of private label

Greater emphasis on natural ingredients for oral care likely over forecast period

Environmental awareness likely to influence players' development strategies

CATEGORY DATA

Table 98 Sales of Oral Care by Category: Value 2017-2022

Table 99 Sales of Oral Care by Category: % Value Growth 2017-2022

Table 100 Sales of Toothbrushes by Category: Value 2017-2022

Table 101 Sales of Toothbrushes by Category: % Value Growth 2017-2022

Table 102 Sales of Toothpaste by Type: % Value Breakdown 2018-2022

Table 103 NBO Company Shares of Oral Care: % Value 2018-2022

Table 104 LBN Brand Shares of Oral Care: % Value 2019-2022

Table 105 LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2019-2022

Table 106 LBN Brand Shares of Toothpaste: % Value 2019-2022

Table 107 Forecast Sales of Oral Care by Category: Value 2022-2027

Table 108 Forecast Sales of Oral Care by Category: % Value Growth 2022-2027

Table 109 Forecast Sales of Toothbrushes by Category: Value 2022-2027

Table 110 Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

SKIN CARE IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Stabilising demand in 2022, while smaller brands look to attract younger generations
Retailers respond to high cost of living with more affordable skin care options
Event marketing resumes, supported by experiential retail and new themes

PROSPECTS AND OPPORTUNITIES

Positive performance for skin care, but players must be aware of competing categories and heightened price sensitivity

Players to focus on marketing specific benefits and targeting future consumers

Sustainability to the fore but players must avoid greenwashing

CATEGORY DATA

Table 111 Sales of Skin Care by Category: Value 2017-2022

Table 112 Sales of Skin Care by Category: % Value Growth 2017-2022

Table 113 NBO Company Shares of Skin Care: % Value 2018-2022

Table 114 LBN Brand Shares of Skin Care: % Value 2019-2022

Table 115 LBN Brand Shares of Basic Moisturisers: % Value 2019-2022

Table 116 LBN Brand Shares of Anti-agers: % Value 2019-2022

Table 117 LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2019-2022

Table 118 LBN Brand Shares of General Purpose Body Care: % Value 2019-2022

Table 119 LBN Brand Shares of Premium Skin Care: % Value 2019-2022

Table 120 Forecast Sales of Skin Care by Category: Value 2022-2027

Table 121 Forecast Sales of Skin Care by Category: % Value Growth 2022-2027

SUN CARE IN AUSTRALIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Solid demand for sun care in 2022 due to strong local awareness of exposure risks

Competition within sun care intensifies with new local brands and private label

Local sun care brands favoured due to stringent regulations that ensure efficacy

PROSPECTS AND OPPORTUNITIES

Further growth potential as players look to innovate by considering both health and appearance with new formulations

Self-tanning set for dynamic performance, driven by awareness and new brands

Updated regulations on permissible ingredients for sun protection in Australia

CATEGORY DATA

Table 122 Sales of Sun Care by Category: Value 2017-2022

Table 123 Sales of Sun Care by Category: % Value Growth 2017-2022

Table 124 NBO Company Shares of Sun Care: % Value 2018-2022

Table 125 LBN Brand Shares of Sun Care: % Value 2019-2022

Table 126 LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022

Table 127 Forecast Sales of Sun Care by Category: Value 2022-2027

Table 128 Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

I would like to order

Product name: Beauty and Personal Care in Australia

Product link: <https://marketpublishers.com/r/BDBFA90B58CEN.html>

Price: US\$ 2,650.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/BDBFA90B58CEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970