

Beauty and Personal Care in Ireland

April 2024

Table of Contents

Beauty and Personal Care in Ireland

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture 2023 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 2018-2023
Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023
Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2019-2023
Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2019-2023
Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023
Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023
Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2018-2023
Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2023
Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028
Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stable results as consumers continue to invest in specific products for children Sun care posts the strongest results as parents prioritise children's health Johnson & Johnson retains its lead while private label gains ground

PROSPECTS AND OPPORTUNITIES

Declining birth rates challenge sales, while the government aims to improve fertility rates The rising age of mothers at first childbirth supports higher expenditure Added-value claims to drive retail value sales as premiumisation rises

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2018-2023
Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023
Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023
Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023
Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023
Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2020-2023
Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023
Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028
Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value 2023-2028
Table 21 - Forecast Sales of Baby and Child-specific Products by Category: % Value 2023-2028

Bath and Shower in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

The reduced threat of COVID-19 limits growth for hand sanitisers and liquid soap Ongoing recovery for body wash/shower gel as consumers return to socialising While major players lead, share is lost to private label options

PROSPECTS AND OPPORTUNITIES

Economic factors to shape sales as cost-conscious behaviour limits retail value growth Local products and sustainable goods set to gain ground across the forecast period Bath routines become more elaborate as interest in skin care grows

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2018-2023

 Table 23 - Sales of Bath and Shower by Category: % Value Growth 2018-2023

Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023

Table 25 - NBO Company Shares of Bath and Shower: % Value 2019-2023

Table 26 - LBN Brand Shares of Bath and Shower: % Value 2020-2023

Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023

Table 28 - Forecast Sales of Bath and Shower by Category: Value 2023-2028

 Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028

Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

Colour Cosmetics in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising inflation limits demand for premium colour cosmetics in 2023 Lip and face products drive sales, supported by new launches in these areas Sales Cosmetics Ltd maintains its lead through an appealing price-quality ratio

PROSPECTS AND OPPORTUNITIES

Positive movement in the economy supports sales of premium colour cosmetics Blurring lines with skin care to offer appealing benefits to consumers Product launches focus on demographic targeting to drive sales

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2018-2023
Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2018-2023
Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2019-2023
Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2020-2023
Table 35 - LBN Brand Shares of Eye Make-up: % Value 2020-2023
Table 36 - LBN Brand Shares of Facial Make-up: % Value 2020-2023
Table 37 - LBN Brand Shares of Lip Products: % Value 2020-2023
Table 38 - LBN Brand Shares of Nail Products: % Value 2020-2023
Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023
Table 40 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028
Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

Deodorants in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Socialising, exercising, and a return to the office drives positive results for deodorants High temperatures support sales across Ireland during 2023 Unilever retains its first place, offering leading brands on the landscape

PROSPECTS AND OPPORTUNITIES

A recovering economy increases leisure time, driving demand for deodorants Functional ingredients and sustainable claims gain popularity across the forecast period Direct-to-consumer deodorants are set to expand penetration

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2018-2023Table 43 - Sales of Deodorants by Category: % Value Growth 2018-2023Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023Table 45 - NBO Company Shares of Deodorants: % Value 2019-2023Table 46 - LBN Brand Shares of Deodorants: % Value 2020-2023Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023Table 48 - Forecast Sales of Deodorants by Category: Value 2023-2028Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

At home treatments support sales as consumers migrate away from salons Innovations focus on sustainability and efficiency to align with consumer demands Procter & Gamble retains its lead; however, share is lost as private label gains ground

PROSPECTS AND OPPORTUNITIES

Higher levels of socialising drives sales and supports growth in depilatories Natural home-made alternatives offer competition across the forecast period Convenience and skinification to support sales over the forecast period

CATEGORY DATA

- Table 51 Sales of Depilatories by Category: Value 2018-2023
- Table 52 Sales of Depilatories by Category: % Value Growth 2018-2023
- Table 53 Sales of Women's Razors and Blades by Type: % Value Breakdown 2019-2023
- Table 54 NBO Company Shares of Depilatories: % Value 2019-2023
- Table 55 LBN Brand Shares of Depilatories: % Value 2020-2023
- Table 56 Forecast Sales of Depilatories by Category: Value 2023-2028
- Table 57 Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

Fragrances in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium fragrances maintain the top spots despite rising inflation Influencers and social media supports sales of small players on the fragrance landscape Well-known players retain the lead as price-sensitive consumers turn to familiarity

PROSPECTS AND OPPORTUNITIES

The recovering economy drives spending on fragrances across the forecast period Retailing to support sustainability as stores offer fragrance refills

Mood-enhancing fragrances align with health and wellness trends

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2018-2023
Table 59 - Sales of Fragrances by Category: % Value Growth 2018-2023
Table 60 - NBO Company Shares of Fragrances: % Value 2019-2023
Table 61 - LBN Brand Shares of Fragrances: % Value 2020-2023
Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023
Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023
Table 64 - Forecast Sales of Fragrances by Category: Value 2023-2028
Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

Hair Care in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers move away from salons to save costs, benefiting sales of hair care Salon professional hair care benefits from consumers seeking a professional, sleek look L'Oréal UK maintains its top spot, while smaller brands continue to gain ground

PROSPECTS AND OPPORTUNITIES

Salon visits challenge growth, however, salon professional hair care drives volume sales Hair health matters as players launch specialised hair care goods Customisation trend to expand across the forecast period

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2018-2023
Table 67 - Sales of Hair Care by Category: % Value Growth 2018-2023
Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2018-2023
Table 69 - NBO Company Shares of Hair Care: % Value 2019-2023
Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023
Table 71 - LBN Brand Shares of Hair Care: % Value 2020-2023
Table 72 - LBN Brand Shares of Colourants: % Value 2020-2023
Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023
Table 74 - LBN Brand Shares of Styling Agents: % Value 2020-2023
Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2020-2023
Table 76 - Forecast Sales of Hair Care by Category: Value 2023-2028
Table 77 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men shift to sharing products with the family, limiting growth in men's grooming Competition from small electronic devices challenges sales in men's grooming Procter & Gamble retains its lead as Gillette aligns with the manscaping trend

PROSPECTS AND OPPORTUNITIES

The recovery of the economy to support sales as sustainability shapes innovation Targeted products and added-value positions bolster retail value growth The rising no hair trend shapes product launches and increases competition

CATEGORY DATA

- Table 79 Sales of Men's Grooming by Category: Value 2018-2023
 Table 80 Sales of Men's Grooming by Category: % Value Growth 2018-2023
 Table 81 Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023
 Table 82 Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023
 Table 83 NBO Company Shares of Men's Grooming: % Value 2019-2023
 Table 84 LBN Brand Shares of Men's Grooming: % Value 2020-2023
 Table 85 LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023
 Table 86 Forecast Sales of Men's Grooming by Category: Value 2023-2028
- Table 87 Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

Oral Care in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

The essential status of oral health drives sales during tough economic times Tooth whiteners drive retail volume growth as consumers desire a perfect smile Major players retain the lead while private label options gains ground in 2023

PROSPECTS AND OPPORTUNITIES

The economic recovery aids sales, however, professional tooth whitening is a threat Sophisticated premium oral care is set to become more common Sustainability and multifunctional appeal boosts retail value growth

CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2018-2023
Table 89 - Sales of Oral Care by Category: % Value Growth 2018-2023
Table 90 - Sales of Toothbrushes by Category: Value 2018-2023
Table 91 - Sales of Toothbrushes by Category: % Value Growth 2018-2023
Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2019-2023
Table 93 - NBO Company Shares of Oral Care: % Value 2019-2023
Table 94 - LBN Brand Shares of Oral Care: % Value 2020-2023
Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2020-2023
Table 96 - LBN Brand Shares of Toothpaste: % Value 2020-2023
Table 97 - Forecast Sales of Oral Care by Category: Value 2023-2028
Table 98 - Forecast Sales of Oral Care by Category: Walue Growth 2023-2028
Table 99 - Forecast Sales of Toothbrushes by Category: Walue Growth 2023-2028
Table 90 - Forecast Sales of Toothbrushes by Category: Walue Growth 2023-2028

Skin Care in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Multifunctional products grow in popularity as consumers look to save costs Consumers search for key skin care ingredients with scientific backing L'Oréal loses share as Allegro Ltd and smaller players gain ground

PROSPECTS AND OPPORTUNITIES

Skin care brands focus on superfood ingredients and a social purpose Skin care increasingly blurs lines with colour cosmetics and SPF to add value Local brands are set to rise as domestic players launch in the premium segment

CATEGORY DATA

Table 101 - Sales of Skin Care by Category: Value 2018-2023Table 102 - Sales of Skin Care by Category: % Value Growth 2018-2023Table 103 - NBO Company Shares of Skin Care: % Value 2019-2023Table 104 - LBN Brand Shares of Skin Care: % Value 2020-2023Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2020-2023Table 106 - LBN Brand Shares of Anti-agers: % Value 2020-2023Table 107 - LBN Brand Shares of Firming Body Care: % Value 2020-2023Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2020-2023Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023Table 109 - LBN Brand Shares of Skin Care by Category: Value 2023-2023Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

A return to holidays and the rising awareness of sun protection support sales Competition from other products challenges sales of sun care in Ireland L'Oréal(UK) retains its lead, however, share is lost to Allegro Ltd with Nivea Sun

PROSPECTS AND OPPORTUNITIES

Positive economic factors drive demand for holidays and boost sales for sun care Natural ingredients, self-care and preventative health boost forecast growth Opportunity for growth as players market sun care as a year-round product

CATEGORY DATA

Table 112 - Sales of Sun Care by Category: Value 2018-2023Table 113 - Sales of Sun Care by Category: % Value Growth 2018-2023Table 114 - NBO Company Shares of Sun Care: % Value 2019-2023Table 115 - LBN Brand Shares of Sun Care: % Value 2020-2023Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023Table 117 - Forecast Sales of Sun Care by Category: Value 2023-2028Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium options perform well within both fragrances and colour cosmetics L'Oréal retains the lead, while competition rises from dermo-cosmetics Online engagement tools drive sales in premium beauty and personal care

PROSPECTS AND OPPORTUNITIES

A recovering economy aids sales of premium offerings over the forecast period Innovation to focus on sustainability, with retailers set to provide refill options Players focus on launching electronic devices to improve efficacy

CATEGORY DATA

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in Ireland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Declining disposable incomes lead consumers to focus on essential items Trading down negatively impacts sales of some mass market brands L'Oréal retains its lead, while smaller players gain ground on the landscape

PROSPECTS AND OPPORTUNITIES

Rising disposable incomes will lead some consumers to migrate to premium goods Gender-neutral, multifunctional products gain ground in Ireland Local ranges thrive while retailers focus on their own lines of beauty and personal care

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2023-2028

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-ireland/report.