

Beauty and Personal Care in Slovakia

April 2024

Table of Contents

Beauty and Personal Care in Slovakia

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumer demand remains resilient in face of price increases in baby and child- specific products

Baby and child-specific sun care continue to perform well

Brands and private label seek to reduce their carbon footprint

PROSPECTS AND OPPORTUNITIES

Lower birth rate may limit growth potential

Private label is expected to thrive in upcoming period

Sustainability issue to gain importance among Slovakians

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 Growth 2023-2028
- Table 21 Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

Bath and Shower in Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Discounter presence is amplified by retail inflation

Bar soaps continue to attract consumer interest amid sustainability concerns

Intimate washes record growth in both retail value and volume

PROSPECTS AND OPPORTUNITIES

Natural and eco-friendly bath and shower products will continue to grain traction

Refillable pouches and packaging to spread across the category

Value for money to remain high on the consumer agenda

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Colour cosmetics receives boost to value sales as consumption picks up

Other lash and brow make-up products is one of the most dynamic categories

Lipstick effect stirs up demand for colour cosmetics

PROSPECTS AND OPPORTUNITIES

Slower growth is expected in early part of forecast period

Discounters and private label to benefit from wider range of colour cosmetics

Social media offers fast track to marketing colour cosmetics

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 2023-2028
- Table 41 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

Deodorants in Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Category suffers from downtrading to cheaper alternatives and private label

International players continue to dominate the category

Brands that embrace natural ingredients are highly desirable

PROSPECTS AND OPPORTUNITIES

Deodorants category unlikely to see any significant growth in retail value or volume

Solid deodorants expected to gain popularity

Packaging to be a major focus of innovation

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2018-2023

Table 43 - Sales of Deodorants by Category: % Value Growth 2018-2023

Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023

Table 45 - NBO Company Shares of Deodorants: % Value 2019-2023

Table 46 - LBN Brand Shares of Deodorants: % Value 2020-2023

Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023

Table 48 - Forecast Sales of Deodorants by Category: Value 2023-2028

Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028

Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Electric epilators and IPL continue to stifle retail volume growth

Rising prices push consumers towards cheaper alternatives

E-commerce and discounters gain traction in distribution

PROSPECTS AND OPPORTUNITIES

Modest outlook for depilatories

Shift towards natural ingredients will gain pace

Competitive landscape to remain stable with some shift towards private label

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium fragrances drive category growth and outperform mass segment

Stellar performance of fragrance sets in both value and volume terms

Consumers seek fragrances that improve wellbeing

PROSPECTS AND OPPORTUNITIES

Premiumisation of fragrances will continue over the forecast period

Consumers will increasingly demand transparency regarding the source and quality of ingredients

Growing consumer interest in niche fragrances

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hair care continues to see healthy growth in 2023, albeit at slower pace Salon professional hair care outperforms the entire hair care category L'Oréal Slovensko gains value share at the expense of Henkel Slovensko

PROSPECTS AND OPPORTUNITIES

Personalisation to play increasingly important role Consumers are likely to remain highly price-sensitive Unilever launches 15 new bond repair products for 2024

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 Category: % Value Growth 2023-2028
- Table 78 Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men's grooming continues in its positive trajectory

Preference for wearing a beard restricts volumes sales

Premium men's skin care fares better than other premium categories

PROSPECTS AND OPPORTUNITIES

Robust performance over the forecast period

E-commerce is set to perform well in the forthcoming years

The beard trend will continue to impact men's shaving

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 Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tooth whiteners benefit from increased demand and wider offering E-commerce remains an important channel regardless of slowdown

Toothpaste remains the largest category by volume

PROSPECTS AND OPPORTUNITIES

Electric toothbrushes are likely to see further growth as technology advances Mildly positive outlook as consumers focuses on preventative dental care Sustainability set to gain traction in the forecast period

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: % Value Growth 2023-2028
- Table 99 Forecast Sales of Toothbrushes by Category: Value 2023-2028
- Table 100 Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Skin care records healthy retail value growth fuelled by face care Skinimalism gains further consumer interest Inflationary pressures stifle potential volume growth in skin care

PROSPECTS AND OPPORTUNITIES

Brands will likely focus on ingredients with specific claims
Green beauty will continue to be trendy among Slovak consumers
Targeted skin care will thrive over the forecast period

CATEGORY DATA

Table 101 - Sales of Skin Care by Category: Value 2018-2023

Table 102 - Sales of Skin Care by Category: % Value Growth 2018-2023

Table 103 - NBO Company Shares of Skin Care: % Value 2019-2023

Table 104 - LBN Brand Shares of Skin Care: % Value 2020-2023

Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2020-2023

Table 106 - LBN Brand Shares of Anti-agers: % Value 2020-2023

Table 107 - LBN Brand Shares of Firming Body Care: % Value 2020-2023

Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2020-2023

Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023

Table 110 - Forecast Sales of Skin Care by Category: Value 2023-2028

Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sun care records robust growth

Private label faces supply issues in 2023

Preventative health and rising demand for higher SPF sun protection

PROSPECTS AND OPPORTUNITIES

Bright outlook for sun care as climate warms and travel industry thrives

Certified products will continue to gain further share

Lines to blur between skin care and sun care

CATEGORY DATA

Table 112 - Sales of Sun Care by Category: Value 2018-2023

Table 113 - Sales of Sun Care by Category: % Value Growth 2018-2023

Table 114 - NBO Company Shares of Sun Care: % Value 2019-2023

Table 115 - LBN Brand Shares of Sun Care: % Value 2020-2023

Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023

Table 117 - Forecast Sales of Sun Care by Category: Value 2023-2028

Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Skin care and sun care are clear winners in premium segment

Blurred lines across channels supports growth as consumers shop all in one place

Premium categories fared well despite high inflation

PROSPECTS AND OPPORTUNITIES

Premium skin care set to perform rather well over the forecast period

Premium hair care is likely to benefit from stronger focus on healthy hair

Consumers will look for cost-saving options when purchasing premium products

CATEGORY DATA

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023

Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 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 2020-2023

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in Slovakia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mass segment records solid growth in current value terms
Discounters gain share due to inflationary climate
Mass skin care is most dynamic category

PROSPECTS AND OPPORTUNITIES

Lower retail prices to boost volume sales

German drugstore chain Rossmann may enter the Slovak market

Multinationals will continue to shape beauty and personal care challenged by private label

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028

Table 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 focusing 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-slovakia/report.