Beauty and Personal Care in Bulgaria

April 2023

Table of Contents
Beauty and Personal Care in Bulgaria

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 - Distribution of Beauty and Personal Care by Format: % Value 2017-2022
Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2022
Table 9 - Forecast Sales of Beauty and Personal Care by Category: % Value 2022-2027
Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Rising product awareness drives growth despite declining birth rate in 2022
E-commerce’s strong development boots sales of baby and child-specific products
Resumption of travel boosts demand for baby and child-specific sun care

PROSPECTS AND OPPORTUNITIES

Increasing product and care awareness supports future category growth
Investment in social media key to brand success
Convenience and channel immaturity ensure strong future for e-commerce

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2017-2022
Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022
Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in Bulgaria
KEY DATA FINDINGS

2022 DEVELOPMENTS

Consumers increasingly opting for convenient and cost-effective larger packs
Bar soap continues to hold a prominent market share in 2022
Ecological claims increasingly important in bath and shower

PROSPECTS AND OPPORTUNITIES

Private label expansion in a time of high inflation
Zero-waste and ethical consumption set to increasingly impact the category
E-commerce accelerates, bringing niche products into mainstream

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2017-2022
Table 23 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 25 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 26 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
Table 28 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Robust growth for colour cosmetics with eye make-up remaining an essential part of many women’s beauty routines
Promotional activities and discounts of online retailers appeal to bargain hunters and drive further growth of e-commerce
Affordability and influence of social media drive sales of mass cosmetics

PROSPECTS AND OPPORTUNITIES

Strong future, with colour cosmetics to outperform review period growth
Rising popularity of convenient e-commerce
Organic and natural colour cosmetics set to remain niche

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2018-2022
Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
Table 35 - LBN Brand Shares of Eye Make-up: % Value 2019-2022
Table 36 - LBN Brand Shares of Facial Make-up: % Value 2019-2022
Table 37 - LBN Brand Shares of Lip Products: % Value 2019-2022
Table 38 - LBN Brand Shares of Nail Products: % Value 2019-2022
Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

Deodorants in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS
Lifting of pandemic restrictions, low household penetration and innovation support deodorant sales in 2022
Rising demand for green deodorants
Convenience trend influences consumer deodorant preferences

PROSPECTS AND OPPORTUNITIES
Sales supported by promotions, discounts and loyalty programmes
Growth of more natural products, whilst wipes set to remain negligible
Convenience and wide product range to drive further growth of e-commerce

CATEGORY DATA
Table 42 - Sales of Deodorants by Category: Value 2017-2022
Table 43 - Sales of Deodorants by Category: % Value Growth 2017-2022
Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
Table 45 - NBO Company Shares of Deodorants: % Value 2018-2022
Table 46 - LBN Brand Shares of Deodorants: % Value 2019-2022
Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2019-2022
Table 48 - Forecast Sales of Deodorants by Category: Value 2022-2027
Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

Depilatories in Bulgaria

KEY DATA FINDINGS
2022 DEVELOPMENTS
Bulgarian women appreciate the convenience of shaving
Notable shift to private label due to economic instability and rising prices
Increased interest in natural ingredients

PROSPECTS AND OPPORTUNITIES
Convenience and natural ingredients to remain key drivers of growth
E-commerce growth fuelled by increased product variety and price-sensitivity
Potential in nascent men’s segment and multi-functional products

CATEGORY DATA
Table 51 - Sales of Depilatories by Category: Value 2017-2022
Table 52 - Sales of Depilatories by Category: % Value Growth 2017-2022
Table 53 - Sales of Women’s Razors and Blades by Type: % Value Breakdown 2018-2022
Table 54 - NBO Company Shares of Depilatories: % Value 2018-2022
Table 55 - LBN Brand Shares of Depilatories: % Value 2019-2022
Table 56 - Forecast Sales of Depilatories by Category: Value 2022-2027
Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

Fragrances in Bulgaria

KEY DATA FINDINGS
2022 DEVELOPMENTS
Lifting of pandemic restrictions boosts demand for fragrances in 2022
E-commerce expansion with retailers investing in building their presence online
Remarkable 2022 for L’Oréal

PROSPECTS AND OPPORTUNITIES
Premium fragrances to outperform mass as a refined image is important even during uncertain economic times
Omnichannel approach, loyalty programmes and discounts crucial for retailers
Competitive landscape set to remain unchanged

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2017-2022
Table 59 - Sales of Fragrances by Category: % Value Growth 2017-2022
Table 60 - NBO Company Shares of Fragrances: % Value 2018-2022
Table 61 - LBN Brand Shares of Fragrances: % Value 2019-2022
Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022
Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022
Table 64 - Forecast Sales of Fragrances by Category: Value 2022-2027
Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2022-2027

Hair Care in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Hair care growth with rising popularity of private label
Surging popularity of dry shampoos, while perms and relaxants continue their downward trajectory
Professional hair care growth fuelled by online retailers

PROSPECTS AND OPPORTUNITIES

Value sales growth driven by higher value, innovative products
Social media will continue to play an important role
Bulgarian women looking for more comprehensive hair care solutions

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2017-2022
Table 67 - Sales of Hair Care by Category: % Value Growth 2017-2022
Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2017-2022
Table 69 - NBO Company Shares of Hair Care: % Value 2018-2022
Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
Table 71 - LBN Brand Shares of Hair Care: % Value 2019-2022
Table 72 - LBN Brand Shares of Colourants: % Value 2019-2022
Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
Table 74 - LBN Brand Shares of Styling Agents: % Value 2019-2022
Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2019-2022
Table 76 - Forecast Sales of Hair Care by Category: Value 2022-2027
Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Strong 2022 for men's fragrances and skin care, although the latter category remains underdeveloped
Increasing number of specialist internet retailers and strong fragrance demand support further e-commerce growth in 2022
Beard trend continues to impact the performance of men's shaving

PROSPECTS AND OPPORTUNITIES

Rising demand for economy and private label products due to economic instability
Manufacturers to adapt to new grooming habits
Rising number of internet retailers selling men's products to fuel e-commerce growth
CATEGORY DATA

Table 79 - Sales of Men's Grooming by Category: Value 2017-2022
Table 80 - Sales of Men's Grooming by Category: % Value Growth 2017-2022
Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2019-2022
Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022
Table 83 - NBO Company Shares of Men's Grooming: % Value 2018-2022
Table 84 - LBN Brand Shares of Men's Grooming: % Value 2019-2022
Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2019-2022
Table 86 - Forecast Sales of Men's Grooming by Category: Value 2022-2027
Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2022-2027

Oral Care in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Major players boost sales of oral care with education initiatives
Social media fuels demand for whitening products
Electric toothbrushes are perceived to be more effective

PROSPECTS AND OPPORTUNITIES

Private label set to perform well due to rising price-sensitivity
Continued switch to electric toothbrushes
Growth of e-commerce driven by power toothbrushes

CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2017-2022
Table 89 - Sales of Oral Care by Category: % Value Growth 2017-2022
Table 90 - Sales of Toothbrushes by Category: Value 2017-2022
Table 91 - Sales of Toothbrushes by Category: % Value Growth 2017-2022
Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2018-2022
Table 93 - NBO Company Shares of Oral Care: % Value 2018-2022
Table 94 - LBN Brand Shares of Oral Care: % Value 2019-2022
Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2019-2022
Table 96 - LBN Brand Shares of Toothpaste: % Value 2019-2022
Table 97 - Forecast Sales of Oral Care by Category: Value 2022-2027
Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
Table 99 - Forecast Sales of Toothbrushes by Category: Value 2022-2027
Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

Skin Care in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Rising popularity of products that target specific skin problems
Investment and increased trust in e-commerce drive channel growth
Social media is a key purchase trigger for many skin care consumers

PROSPECTS AND OPPORTUNITIES

Growth supported by information, marketing campaigns and a focus on clean skin
Gen Z set to be the leading skin care consumers
E-commerce to play an important role in the development of skin care
**CATEGORY DATA**

Table 101 - Sales of Skin Care by Category: Value 2017-2022  
Table 102 - Sales of Skin Care by Category: % Value Growth 2017-2022  
Table 103 - NBO Company Shares of Skin Care: % Value 2018-2022  
Table 104 - LBN Brand Shares of Skin Care: % Value 2019-2022  
Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2019-2022  
Table 106 - LBN Brand Shares of Anti-agers: % Value 2019-2022  
Table 107 - LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2019-2022  
Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2019-2022  
Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2019-2022  
Table 110 - Forecast Sales of Skin Care by Category: Value 2022-2027  
Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2022-2027

**KEY DATA FINDINGS**

2022 DEVELOPMENTS

Lifting of travel restrictions and good weather support sun care sales in 2022  
Manufacturers drive increased demand for premium dermatocosmetics with strong marketing campaigns  
Convenient spray format increasingly popular in sun care

PROSPECTS AND OPPORTUNITIES

Rising parental awareness of the need for prevention and new products set to drive sales of baby and child-specific sun care  
Dermocosmetics appeal with their skin care benefits  
Tourism will continue to play an important role

**CATEGORY DATA**

Table 112 - Sales of Sun Care by Category: Value 2017-2022  
Table 113 - Sales of Sun Care by Category: % Value Growth 2017-2022  
Table 114 - NBO Company Shares of Sun Care: % Value 2018-2022  
Table 115 - LBN Brand Shares of Sun Care: % Value 2019-2022  
Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022  
Table 117 - Forecast Sales of Sun Care by Category: Value 2022-2027  
Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

**Sun Care in Bulgaria**

**KEY DATA FINDINGS**

2022 DEVELOPMENTS

Strong 2022 for premium beauty and personal care due to massive advertising campaigns in collaboration with influencers  
E-commerce is a developed and demanded channel  
L’Oréal Bulgaria leads with its wide product range, significant investment and constant innovation

PROSPECTS AND OPPORTUNITIES

Rising interest in dermatocosmetics  
Challenge ahead with slow economic recovery  
Premium brands need to maintain differentiation to sustain their performance

**CATEGORY DATA**

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022  
Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022  
Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
KEY DATA FINDINGS

2022 DEVELOPMENTS
A positive 2022, with rising private label demand due to high inflation
E-commerce’s growth continues thanks to strong presence of online retailers such as Notino and eMAG
Rising consumer interest in natural products

PROSPECTS AND OPPORTUNITIES
Shift from premium to mass brands due to high inflation and economic instability
Increasingly affordable premium fragrances set to gain share
Significant growth of convenient e-commerce expected

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2022-2027

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.