Beauty and Personal Care in Lithuania

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 Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Parents remain willing to invest more in products for children, boosting growth
The warm summer drives strong growth for baby and child-specific sun care
Local player Kake Make is a leading competitor against global offerings

PROSPECTS AND OPPORTUNITIES

Low birth rates and the weak performance of baby wipes challenges the landscape
Skin care goes premium as parents invest in products for their children
The demand for natural and organic ingredients shapes product innovation

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 Sun Care: % Value 2020-2023
Table 17 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023
Table 18 - Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028
Table 20 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

Bath and Shower in Lithuania

KEY DATA FINDINGS
2023 DEVELOPMENTS

Positive year for bath and shower following the return to socialising
Intimate hygiene records positive retail volume growth as consumers appreciate the benefits
The local leader remains in its top position, while Old Spice gains ground

PROSPECTS AND OPPORTUNITIES

Bath and shower gel performs well, while bath additives decline
Intimate hygiene washes is set to drive above average market growth
Increasing share for pharmacists due to the wide range of functional products

CATEGORY DATA

Table 21 - Sales of Bath and Shower by Category: Value 2018-2023
Table 22 - Sales of Bath and Shower by Category: % Value Growth 2018-2023
Table 23 - Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023
Table 24 - NBO Company Shares of Bath and Shower: % Value 2019-2023
Table 25 - LBN Brand Shares of Bath and Shower: % Value 2020-2023
Table 26 - LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023
Table 27 - Forecast Sales of Bath and Shower by Category: Value 2023-2028
Table 28 - Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028
Table 29 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

Colour Cosmetics in Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive growth as consumers return to socialising and the workplace
Convenience and quality drive sales of BB/CC creams and mascara
L’Oréal retain its lead, however, Cosnova is rising competition

PROSPECTS AND OPPORTUNITIES

The natural trend is a rising challenge for colour cosmetic brands
Nail care salons continue to shrink the popularity of at-home nail care
Cosnova continues to increase its competitive position against L’Oréal

CATEGORY DATA

Table 30 - Sales of Colour Cosmetics by Category: Value 2018-2023
Table 31 - Sales of Colour Cosmetics by Category: % Value Growth 2018-2023
Table 32 - Sales of Colour Cosmetics by Premium vs Mass: % Value 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 Premium Colour Cosmetics: % Value 2020-2023
Table 36 - Forecast Sales of Colour Cosmetics by Category: Value 2023-2028
Table 37 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028
Table 38 - Forecast Sales of Colour Cosmetics by Premium vs Mass: % Value 2023-2028

Deodorants in Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS

The return to socialising and the workplace drives demand for deodorants in 2023
Rising interest in natural deodorants shapes the competitive landscape
Old Spice increases share while Gillette and Nivea offer new product choices
PROSPECTS AND OPPORTUNITIES
Natural products and a shift to premiumisation present growth opportunities
Allergies and skin concerns drive growth in the pharmacy channel
Consumers continue to preference deodorant roll-ons and sprays

CATEGORY DATA
Table 39 - Sales of Deodorants by Category: Value 2018-2023
Table 40 - Sales of Deodorants by Category: % Value Growth 2018-2023
Table 41 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023
Table 42 - NBO Company Shares of Deodorants: % Value 2019-2023
Table 43 - LBN Brand Shares of Deodorants: % Value 2020-2023
Table 44 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023
Table 45 - Forecast Sales of Deodorants by Category: Value 2023-2028
Table 46 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028
Table 47 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in Lithuania

KEY DATA FINDINGS
2023 DEVELOPMENTS
Retail volume growth is positive in all areas, driven by socialising and warm weather
Beauty salons negatively impact growth, challenging sales as consumers seek professionals
Veet retains its lead in hair removers/bleaches, while Gillette Venus holds its overall top spot
PROSPECTS AND OPPORTUNITIES
Sales struggle as laser hair removal becomes an affordable option
Gillette Venus maintains a strong position as Wilkinson has potential to gain ground
Affordable multi-packs versus high-quality, long-lasting razors and blades

CATEGORY DATA
Table 48 - Sales of Depilatories by Category: Value 2018-2023
Table 49 - Sales of Depilatories by Category: % Value Growth 2018-2023
Table 50 - NBO Company Shares of Depilatories: % Value 2019-2023
Table 51 - LBN Brand Shares of Depilatories: % Value 2020-2023
Table 52 - Forecast Sales of Depilatories by Category: Value 2023-2028
Table 53 - Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

Fragrances in Lithuania

KEY DATA FINDINGS
2023 DEVELOPMENTS
Sales through physical retailing and gifting rise as socialising drives growth
Premium fragrances drive sales as niche offerings gain ground
Unisex brands grow in popularity, especially among Generation Z consumers
PROSPECTS AND OPPORTUNITIES
Ongoing growth for fragrances driven by premium and niche offerings
Digitalisation expands as sales through e-commerce continue to rise
Growing demand for affordable premium unisex fragrances

CATEGORY DATA
Table 54 - Sales of Fragrances by Category: Value 2018-2023
Hair Care in Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS
A decline in supermarket hair care sales as consumers opt for salon-grade solutions
Women favour specialist products, while men use multi-functional offerings
Newcomers enter the landscape using social media platforms, including TikTok

PROSPECTS AND OPPORTUNITIES
Professional hair care grows as 2-in-1 products record a decline
Local players and tailored product lines increase over the forecast period
Sustainability is set to shape product innovation and packaging

CATEGORY DATA
Table 62 - Sales of Hair Care by Category: Value 2018-2023
Table 63 - Sales of Hair Care by Category: % Value Growth 2018-2023
Table 64 - Sales of Hair Care by Premium vs Mass: % Value 2018-2023
Table 65 - NBO Company Shares of Hair Care: % Value 2019-2023
Table 66 - LBN Brand Shares of Hair Care: % Value 2020-2023
Table 67 - NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023
Table 68 - LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023
Table 69 - LBN Brand Shares of Premium Hair Care: % Value 2020-2023
Table 70 - Forecast Sales of Hair Care by Category: Value 2023-2028
Table 71 - Forecast Sales of Hair Care by Category: % Value Growth 2023-2028
Table 72 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS
Out-of-home activities boost sales of men's fragrances and hair care
Premium products struggle as men preference mass brands in skin care and bath and shower
Procter and Gamble invest in King C and Old Spice during 2023

PROSPECTS AND OPPORTUNITIES
A rising focus on beard care as men move away from shaving
The mass market is set to dominate men's purchases over the forecast period
Innovations which focus on targeting specific problems boost growth

CATEGORY DATA
Table 73 - Sales of Men's Grooming by Category: Value 2018-2023
Table 74 - Sales of Men's Grooming by Category: % Value Growth 2018-2023
Table 75 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023
Table 76 - Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023
Oral Care in Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS
Retail value growth driven by ongoing inflation, leading retail volume sales to decline
Denture care offers strong opportunities while dental floss gains ground
Multinationals remain in top positions with local players offering flavour innovations

PROSPECTS AND OPPORTUNITIES
Steady growth as innovations focus on targeted benefits, including whitening
Electric toothbrushes gain ground as rising availability drives sales
Availability of sustainable goods rises, however, consumers remain price-conscious

CATEGORY DATA
Table 82 - Sales of Oral Care by Category: Value 2018-2023
Table 83 - Sales of Oral Care by Category: % Value Growth 2018-2023
Table 84 - Sales of Toothbrushes by Category: Value 2018-2023
Table 85 - Sales of Toothbrushes by Category: % Value Growth 2018-2023
Table 86 - Sales of Toothpaste by Type: % Value Breakdown 2019-2023
Table 87 - NBO Company Shares of Oral Care: % Value 2019-2023
Table 88 - LBN Brand Shares of Oral Care: % Value 2020-2023
Table 90 - Forecast Sales of Oral Care by Category: Value 2023-2028
Table 91 - Forecast Sales of Oral Care by Category: % Value Growth 2023-2028
Table 92 - Forecast Sales of Toothbrushes by Category: Value 2023-2028
Table 92 - Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS
Double-digit retail value growth as skin care routines remain in place
Face hydration and moisturising drives ongoing growth in 2023
Pharmacies become a key retail channel, increasingly offering premium skin care

PROSPECTS AND OPPORTUNITIES
Rising disposable incomes drive growth as premium skin care rises
The natural look drives growth in skin care as consumers seek a fresh face
Retaining consumer loyalty becomes challenging as competition intensifies

CATEGORY DATA
Table 93 - Sales of Skin Care by Category: Value 2018-2023
Table 94 - Sales of Skin Care by Category: % Value Growth 2018-2023
Table 95 - NBO Company Shares of Skin Care: % Value 2019-2023
Table 96 - LBN Brand Shares of Skin Care: % Value 2020-2023
Table 97 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023
Table 98 - Forecast Sales of Skin Care by Category: Value 2023-2028
Table 99 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive retail value and volume growth bolstered by the warm weather
Self-tanning drives positive retail volume sales in 2023
Premiumisation rises as derma brands gain popularity on the sun care landscape

PROSPECTS AND OPPORTUNITIES

Daily SPF use increases as consumers focus on skin care routines
Premium and derma sun care continue to gain ground across the coming years
Holidays in hot locations drive sales of sun care products over the forecast period

CATEGORY DATA

Table 100 - Sales of Sun Care by Category: Value 2018-2023
Table 101 - Sales of Sun Care by Category: % Value Growth 2018-2023
Table 102 - Sales of Sun Care by Premium vs Mass: % Value 2018-2023
Table 103 - NBO Company Shares of Sun Care: % Value 2019-2023
Table 104 - LBN Brand Shares of Sun Care: % Value 2020-2023
Table 105 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023
Table 106 - Forecast Sales of Sun Care by Category: Value 2023-2028
Table 107 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Strong growth for premium goods as skin care remains a priority for many
Premium fragrances outperforms mass, even in times of economic strain
High-quality facial care continues to shape the landscape in 2023

PROSPECTS AND OPPORTUNITIES

Growth for premium skin care, sun care and colour cosmetics
Professional hair care gains ground as players focus on key ingredients
Rising demand for added-value drives innovation across the forecast period

CATEGORY DATA

Table 108 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023
Table 109 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023
Table 110 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023
Table 111 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023
Table 112 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028
Table 113 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in Lithuania

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers focus on mass beauty and personal care in essential product areas
Domestic offerings have a strong presence on the mass landscape
Old Spice gains ground, boosting growth for mass men’s grooming

PROSPECTS AND OPPORTUNITIES

Mass offerings continue to drive sales through an appealing price-quality ratio
Mass market leaders establish stronger positions across the coming years
E-commerce and physical retailing place pressure on the mass market

CATEGORY DATA

Table 114 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023
Table 115 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023
Table 116 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023
Table 117 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023
Table 118 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028
Table 119 - 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.