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

Baby and Child-Specific Products in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS
Price increases boost value sales growth in 2022
Sun care is dynamic and continues to see strong growth during 2022
Dr Fischer remains a popular choice among parents in 2022 despite higher price

PROSPECTS AND OPPORTUNITIES
Demand for baby and child-specific products set to stabilise during the forecast period
Sales of sun care to be stimulated by awareness of skin health during the forecast period
Parents willing to pay more for trusted products, and thus a rise in product launches over the forecast period

CATEGORY DATA
Table 9 - Sales of Baby and Child-specific Products by Category: Value 2017-2022
Table 10 - Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
Table 11 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
Table 12 - NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
Table 13 - LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
Table 14 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022
Table 15 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
Table 16 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
Table 17 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 18 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 19 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in Israel

KEY DATA FINDINGS
2022 DEVELOPMENTS

Unilever price increases lead to out of stock products in shops at the end of 2022
Demand for hand sanitisers weaken and number of brands decline in 2022
More consumers use bath additives as self-care trend, boosting sales in 2022

PROSPECTS AND OPPORTUNITIES

Price increases set to continue in 2023 as Unilever likely to come to agreement with supermarkets
Johnson & Johnson Inc to stop selling body powder, leading to a decline in sales over the forecast period
Liquid soap sales set to continue growing during the forecast period as handwashing became a habit during the pandemic

CATEGORY DATA

Table 20 - Sales of Bath and Shower by Category: Value 2017-2022
Table 21 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 22 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 23 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 24 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 25 - LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
Table 26 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 27 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 28 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

COLOUR COSMETICS IN ISRAEL

KEY DATA FINDINGS

2022 DEVELOPMENTS

Mask mandate continues boosting sales of eye make-up in 2022
Retail e-commerce of colour cosmetics continues to expand in Israel during 2022
Super-Pharm decreases shelf space for colour cosmetics at the end of the review period

PROSPECTS AND OPPORTUNITIES

L’Oréal Israel set to continue leading colour cosmetics during the forecast period despite factory closure
Super-Pharm to increase exclusively sold brands over the forecast period
Sales of lip products to stabilise over the forecast period

CATEGORY DATA

Table 29 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 30 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 31 - NBO Company Shares of Colour Cosmetics: % Value 2018-2022
Table 32 - LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
Table 33 - LBN Brand Shares of Eye Make-up: % Value 2019-2022
Table 34 - LBN Brand Shares of Facial Make-up: % Value 2019-2022
Table 35 - LBN Brand Shares of Lip Products: % Value 2019-2022
Table 36 - LBN Brand Shares of Nail Products: % Value 2019-2022
Table 37 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
Table 38 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 39 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

DEODORANTS IN ISRAEL

KEY DATA FINDINGS

2022 DEVELOPMENTS

Unilever increases prices in 2022 but some supermarkets refuse to stock these deodorants
Deodorant creams remain niche and demand continues to decline in 2022
Unilever stops all imports of deodorant sprays from Russia in 2022

PROSPECTS AND OPPORTUNITIES
Prices set to continue increasing but will decline as forecast period progresses
Effect and implementation of imports reform is uncertain
Retail e-commerce set to continue growing value share during the forecast period

CATEGORY DATA
Table 40 - Sales of Deodorants by Category: Value 2017-2022
Table 41 - Sales of Deodorants by Category: % Value Growth 2017-2022
Table 42 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
Table 43 - NBO Company Shares of Deodorants: % Value 2018-2022
Table 44 - LBN Brand Shares of Deodorants: % Value 2019-2022
Table 45 - LBN Brand Shares of Premium Deodorants: % Value 2019-2022
Table 46 - Forecast Sales of Deodorants by Category: Value 2022-2027
Table 47 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
Table 48 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

**Depilatories in Israel**

KEY DATA FINDINGS

2022 DEVELOPMENTS
While Diplomat raises prices for Gillette in 2022, major supermarkets reject these price increases
Permanent hair loss solutions increasing in popularity during 2022, impacting depilatories negatively
Procter & Gamble Israel continues to lead the competition in 2022 with few viable alternatives available

PROSPECTS AND OPPORTUNITIES
Unit prices of depilatories set to increase in the short term
Discounter sales set to rise as consumers seek lower prices during the forecast period
Demand for depilatories likely to decline over the forecast period as consumers seek more permanent solutions

CATEGORY DATA
Table 49 - Sales of Depilatories by Category: Value 2017-2022
Table 50 - Sales of Depilatories by Category: % Value Growth 2017-2022
Table 51 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2018-2022
Table 52 - NBO Company Shares of Depilatories: % Value 2018-2022
Table 53 - LBN Brand Shares of Depilatories: % Value 2019-2022
Table 54 - Forecast Sales of Depilatories by Category: Value 2022-2027
Table 55 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

**Fragrances in Israel**

KEY DATA FINDINGS

2022 DEVELOPMENTS
Retailers are diversifying, with more retailers selling fragrances in 2022
Retail e-commerce continues to increase value share during 2022
Growing demand for luxury brands as consumers prefer unique and distinctive fragrances in 2022

PROSPECTS AND OPPORTUNITIES
Prices of fragrances set to rise in the short term
Super-Pharm planning to increase exclusively sold brands during the forecast period
Lilit Cosmetics to open a chain of stores over the forecast period
CATEGORY DATA

Table 56 - Sales of Fragrances by Category: Value 2017-2022
Table 57 - Sales of Fragrances by Category: % Value Growth 2017-2022
Table 58 - NBO Company Shares of Fragrances: % Value 2018-2022
Table 59 - LBN Brand Shares of Fragrances: % Value 2019-2022
Table 60 - LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022
Table 61 - LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022
Table 62 - Forecast Sales of Fragrances by Category: Value 2022-2027
Table 63 - Forecast Sales of Fragrances by Category: % Value Growth 2022-2027

Hair Care in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS

Some brands increase unit prices in 2022 while others downsize packaging to maintain consumers
2-1 Products continues to decline as consumers shift to premium hair care in 2022
Super-Pharm launches salon professional hair care brand during 2022

PROSPECTS AND OPPORTUNITIES

Unit prices set to increase, boosting value sales in the short term
Demand for colourants likely to rise as consumers return to cost effective solutions over the forecast period
Super-Pharm to open hair salon, set to boost sales of salon professional hair care during the forecast period

CATEGORY DATA

Table 64 - Sales of Hair Care by Category: Value 2017-2022
Table 65 - Sales of Hair Care by Category: % Value Growth 2017-2022
Table 66 - Sales of Hair Care by Premium vs Mass: % Value 2017-2022
Table 67 - NBO Company Shares of Hair Care: % Value 2018-2022
Table 68 - NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
Table 69 - LBN Brand Shares of Hair Care: % Value 2019-2022
Table 70 - LBN Brand Shares of Colourants: % Value 2019-2022
Table 71 - LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
Table 72 - LBN Brand Shares of Styling Agents: % Value 2019-2022
Table 73 - LBN Brand Shares of Premium Hair Care: % Value 2019-2022
Table 74 - Forecast Sales of Hair Care by Category: Value 2022-2027
Table 75 - Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
Table 76 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS

Distributor Diplomat's price increases rejected by many retailers in 2022
Value sales of mass men’s grooming increases due to high prices in 2022
Unilever Sales Drop in 2022

PROSPECTS AND OPPORTUNITIES

Unit prices of men's grooming set to increase in the short term as Shufersal may have to accept price increases
Impact and implementation of Imports Reform over the forecast period unclear
More product launches expected over the forecast period as awareness rises

CATEGORY DATA
Table 77 - Sales of Men's Grooming by Category: Value 2017-2022
Table 78 - Sales of Men's Grooming by Category: % Value Growth 2017-2022
Table 79 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2019-2022
Table 80 - Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022
Table 81 - NBO Company Shares of Men's Grooming: % Value 2018-2022
Table 82 - LBN Brand Shares of Men's Grooming: % Value 2019-2022
Table 83 - LBN Brand Shares of Men's Razors and Blades: % Value 2019-2022
Table 84 - Forecast Sales of Men's Grooming by Category: Value 2022-2027
Table 85 - Forecast Sales of Men's Grooming by Category: % Value Growth 2022-2027

KEY DATA FINDINGS

2022 DEVELOPMENTS
Schestowitz waits to see other players' pricing strategy in 2022, while oral care sales remain healthy due to high prices
Health and wellness trend boosts demand for oral care in 2022
Innovation and new trends prevalent in oral care during 2022

PROSPECTS AND OPPORTUNITIES
Unit prices of oral care expected to increase in the short term before stabilising
Import reforms likely to boost demand for oral care as prices will decline over the forecast period
Premiumisation to focus on health-orientated claims during the forecast period

CATEGORY DATA
Table 86 - Sales of Oral Care by Category: Value 2017-2022
Table 87 - Sales of Oral Care by Category: % Value Growth 2017-2022
Table 88 - Sales of Toothbrushes by Category: Value 2017-2022
Table 89 - Sales of Toothbrushes by Category: % Value Growth 2017-2022
Table 90 - Sales of Toothpaste by Type: % Value Breakdown 2018-2022
Table 91 - NBO Company Shares of Oral Care: % Value 2018-2022
Table 92 - LBN Brand Shares of Oral Care: % Value 2019-2022
Table 93 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2019-2022
Table 94 - LBN Brand Shares of Toothpaste: % Value 2019-2022
Table 95 - Forecast Sales of Oral Care by Category: Value 2022-2027
Table 96 - Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
Table 97 - Forecast Sales of Toothbrushes by Category: Value 2022-2027
Table 98 - Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

Oral Care in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS
Skin specific face masks launched in 2022 as consumers pamper more at home
Dermocosmetics records robust sales growth in 2022, due to demand for natural and healthier products
L'Oréal continues leading skin care in 2022 thanks to strong marketing abilities

PROSPECTS AND OPPORTUNITIES
Price increases expected in the short term due to few prices rises in 2022
Skin whitening likely to continue declining over the forecast period, due to shifts in societal attitudes
At-home technology may threaten body and facial care over the forecast period

CATEGORY DATA
Table 99 - Sales of Oral Care by Category: Value 2017-2022
Table 100 - Sales of Oral Care by Category: % Value Growth 2017-2022
Table 101 - Sales of Toothbrushes by Category: Value 2017-2022
Table 102 - Sales of Toothbrushes by Category: % Value Growth 2017-2022
Table 103 - Sales of Toothpaste by Type: % Value Breakdown 2018-2022
Table 104 - NBO Company Shares of Oral Care: % Value 2018-2022
Table 105 - LBN Brand Shares of Oral Care: % Value 2019-2022
Table 106 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2019-2022
Table 107 - LBN Brand Shares of Toothpaste: % Value 2019-2022
Table 108 - Forecast Sales of Oral Care by Category: Value 2022-2027
Table 109 - Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
Table 110 - Forecast Sales of Toothbrushes by Category: Value 2022-2027
Table 111 - Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

Skin Care in Israel

KEY DATA FINDINGS

2022 DEVELOPMENTS
Skin specific face masks launched in 2022 as consumers pamper more at home
Dermocosmetics records robust sales growth in 2022, due to demand for natural and healthier products
L’Oréal continues leading skin care in 2022 thanks to strong marketing abilities

PROSPECTS AND OPPORTUNITIES
Price increases expected in the short term due to few prices rises in 2022
Skin whitening likely to continue declining over the forecast period, due to shifts in societal attitudes
At-home technology may threaten body and facial care over the forecast period

CATEGORY DATA
Sun Care in Israel
KEY DATA FINDINGS

2022 DEVELOPMENTS
Increasing awareness of sun protection boosts sales of sun care in 2022
Aloe vera as an aftersun product increasingly popular during 2022
Health and wellness trend boosts innovation in sun protection in 2022

PROSPECTS AND OPPORTUNITIES
Awareness of sun exposure set to boost sun care sales during the forecast period
Self-tanning likely to grow in demand over the forecast period, due to being a safer way of attaining a tan
More innovative sun care products to be launched during the forecast period

CATEGORY DATA
Table 110 - Sales of Sun Care by Category: Value 2017-2022
Table 111 - Sales of Sun Care by Category: % Value Growth 2017-2022
Table 112 - NBO Company Shares of Sun Care: % Value 2018-2022
Table 113 - LBN Brand Shares of Sun Care: % Value 2019-2022
Table 114 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022
Table 115 - Forecast Sales of Sun Care by Category: Value 2022-2027
Table 116 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

Premium Beauty and Personal Care in Israel
KEY DATA FINDINGS

2022 DEVELOPMENTS
Unit price rises impacts volume sales growth negatively in 2022
S Schestowitz Ltd continues to lead premium products during 2022
Fusion of beauty and health stimulates interest in dermocosmetics

PROSPECTS AND OPPORTUNITIES
Price increases to continue over the forecast period but sales still likely to grow
Shift to mass alternatives could hurt sales of premium products over the forecast period
Innovative launches to regain value share likely during the forecast period

CATEGORY DATA
Table 117 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022
Table 118 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 119 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
Table 120 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022
2022 DEVELOPMENTS
Increase in prices drives demand for mass beauty and personal care during 2022
Locals increasingly using mass products during 2022, despite uncertainty of quality
Retail e-commerce drives demand for mass products in 2022

PROSPECTS AND OPPORTUNITIES
Sales of mass beauty and personal care set to rise as cost of living increases
Mass products sales may grow at the expense of premium products over the forecast period
More brands with natural positioning to launch during the forecast period

CATEGORY DATA
Table 123 - Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
Table 124 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 125 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
Table 126 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
Table 127 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
Table 128 - 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.