

Beauty and Personal Care in Hungary

April 2024

Table of Contents

Beauty and Personal Care in Hungary

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers shift towards private label and larger pack sizes as incomes are squeezed

Premium products remain popular with health conscious parents

Retail e-commerce remains an increasingly popular option for parents and guardians

PROSPECTS AND OPPORTUNITIES

Parents and guardians set to focus more on avoiding skin allergies

Environmental concerns set to inform new product development and innovation

Players expected to target new mothers to help establish brand loyalty and trust

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

High inflation puts pressure on consumer spending and informs purchasing decisions

Increasing focus on wellness shapes demand

More attention being paid to clean ingredients even at private label level

PROSPECTS AND OPPORTUNITIES

Drugstores set to continue playing a strong role in the distribution of bath and shower

Demand for sustainable packaging set to grow

Larger pack sizes set to gain relevance even in dermocosmetics

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers look to achieve a healthy natural glow

Fortified make-up products attract interest

Price increases tolerated more in the premium segment

PROSPECTS AND OPPORTUNITIES

Retailers exploring new sales opportunities

Convenience is king

E-commerce set to make further inroads

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

World's first deodorant refill stations launched in Hungary
Drugstores retain a leading role in the sale and distribution of deodorants
Brand loyalty remains high despite elevated inflation

PROSPECTS AND OPPORTUNITIES

Duo-packs and other special offers could help offset the impact of high price increases
Sustainability concerns likely to inform new product development and innovation
Consumers expected to pay closer scrutiny to product ingredients

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers go in search of the best value in razors and blades
Products become more specialised and innovative as players compete for share
Competing long-term solutions

PROSPECTS AND OPPORTUNITIES

Improving economy should result in consumers trading up
Advanced technologies likely to present strong competition to depilatories
New product development likely to incorporate eco-friendly solutions

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fragrances sees strong growth in 2023 despite sharp increase in prices
Hungarians show loyalty to premium fragrances
E-commerce continues to gain ground in fragrances

PROSPECTS AND OPPORTUNITIES

Rising demand for niche, artisanal and natural fragrances
Premium fragrances projected to be the most dynamic category

Sustainable packaging solutions set to become more commonplace

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increased focus on home treatments and wellness drives sales of hair care in 2023

Drugstores continue to lead sales supported by the strong performance of their private label lines

Consumers paying more attention to the ingredients in the products they buy

PROSPECTS AND OPPORTUNITIES

Consumers expected to follow increasingly complex hair care routines to get the best results

Sustainable products and packaging expected to make gains

Convenience set to inform new product development

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shifting trends and changing consumer preferences impact sales

Prices soar as inflation continues to bite

Men's grooming sees a growing focus on products to prevent hair loss

PROSPECTS AND OPPORTUNITIES

Fortified pre- and post-shave products for sensitive skin set to become more prevalent

Male beautification trend expected to boost sales

Men's grooming expected to become more diverse and more sophisticated

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing demand for therapeutic oral care products informs new product development

Consumers investing more time and money in their oral care routines

Premiumisation impacts sales of oral care

PROSPECTS AND OPPORTUNITIES

Expansion of green solutions expected in oral care

Rising demand for preventive oral care products

Consumers going in search of a Hollywood smile

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers becoming more informed about the benefits of a good skin care routine

Rise of premium skin care against a backdrop of high inflation

Dermocosmetics thriving while beauty procedures influence sales and more consumers go online

PROSPECTS AND OPPORTUNITIES

The rise of premium dermocosmetics and acne solutions

Sustainable packaging solutions set to come to the fore due to new EU directive

Premium skin care facing a bright future

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Improved education and awareness around the importance of sun protection boosts volume sales in 2023

Less price-sensitivity, more brand loyalty

Price-sensitive customers embrace private label options

PROSPECTS AND OPPORTUNITIES

Sun care set to shine despite competition from other products with added SPF

Sun protection with additional skin care benefits likely to gain attention

Range of self-tanning products expected to grow

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers retain willingness to invest in small indulges

Premium fragrances remain popular

Ageing population presents new sales opportunities

PROSPECTS AND OPPORTUNITIES

Sustainability and preventative health set to be key a key focus in premium beauty and personal care

Players may need to adapt and evolve to changes in the market

Dermocosmetics opening up new opportunities for premium brands

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 Hungary

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers go in search of value for money due to soaring inflation

Retail e-commerce continues to grow but retailers offering the best deals see the strongest growth

Busy consumers look for convenient solutions

PROSPECTS AND OPPORTUNITIES

Sustainability set to come to the fore over the forecast period as consumers and businesses become more responsible

Consumers feeling pressure to always look their best in an increasingly digital world

Advanced product formulas likely to attract sales

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 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-hungary/report.