Beauty and Personal Care in Slovenia

May 2023

Table of Contents
Beauty and Personal Care in Slovenia

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 Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Demographic developments dampening demand
Premiumisation and inflation driving value growth, while sun care performs well
Beiersdorf leads with iconic brand

PROSPECTS AND OPPORTUNITIES

Low fertility rates pose ongoing threat
Ongoing trend towards natural products
E-commerce expansion

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 Sun Care: % Value 2019-2022
Table 17 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
Table 18 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 20 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in Slovenia

KEY DATA FINDINGS
2022 DEVELOPMENTS
Rising hygiene awareness supports growing demand for liquid soap
Private label gaining in popularity, supporting expansion of discounters
Broad portfolio supports Colgate-Palmolive’s leading position

PROSPECTS AND OPPORTUNITIES
Intimate hygiene benefiting from growing consumer awareness
Hand sanitisers set to see decline, but sales remain above pre-pandemic levels
Growing interest in natural and organic products and local producers

CATEGORY DATA
Table 21 - Sales of Bath and Shower by Category: Value 2017-2022
Table 22 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 23 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 24 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 25 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 26 - LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
Table 27 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 28 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 29 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in Slovenia

KEY DATA FINDINGS
2022 DEVELOPMENTS
Revival of outdoor and social activity boosts demand
Many consumers remain brand loyal
Beauty specialists benefit from competitive pricing and broad product offer

2022 DEVELOPMENTS
Cosmetics benefits from growing attention to self-care
Economic instability has limited impact as yet
Cosnova stays on top

PROSPECTS AND OPPORTUNITIES
E-commerce set to see further strong growth
Health awareness supporting demand for products with SPF properties
Nail products to lose out to salon visits

CATEGORY DATA
Table 30 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 31 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 32 - Sales of Colour Cosmetics by Premium vs Mass: % Value 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 Premium Colour Cosmetics: % Value 2019-2022
Table 36 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 37 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027
Table 38 - Forecast Sales of Colour Cosmetics by Premium vs Mass: % Value 2022-2027

Deodorants in Slovenia

KEY DATA FINDINGS
2022 DEVELOPMENTS
Revival of outdoor and social activity boosts demand
Many consumers remain brand loyal
Beauty specialists benefit from competitive pricing and broad product offer

Page 3 of 8
PROSPECTS AND OPPORTUNITIES
-growing focus on natural products
-local players gaining share
-consumers looking for added functionality

CATEGORY DATA

Table 39 - Sales of Deodorants by Category: Value 2017-2022
Table 40 - Sales of Deodorants by Category: % Value Growth 2017-2022
Table 41 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
Table 42 - NBO Company Shares of Deodorants: % Value 2018-2022
Table 43 - LBN Brand Shares of Deodorants: % Value 2019-2022
Table 44 - LBN Brand Shares of Premium Deodorants: % Value 2019-2022
Table 45 - Forecast Sales of Deodorants by Category: Value 2022-2027
Table 46 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
Table 47 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

Depilatories in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Female consumers looking for new, more convenient products
Women look for more enduring results
Gillette and Wilkinson remain dominant

PROSPECTS AND OPPORTUNITIES

Constraints on development
E-commerce to benefit from pricing and product range
Interest in natural and organic ingredients

CATEGORY DATA

Table 48 - Sales of Depilatories by Category: Value 2017-2022
Table 49 - Sales of Depilatories by Category: % Value Growth 2017-2022
Table 50 - NBO Company Shares of Depilatories: % Value 2018-2022
Table 51 - LBN Brand Shares of Depilatories: % Value 2019-2022
Table 52 - Forecast Sales of Depilatories by Category: Value 2022-2027
Table 53 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

Fragrances in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Fragrances sees significant growth
Trend towards lighter scents and expansion of sets/kits
Strong portfolio, competitive pricing and extensive distribution underpin Orbico's lead

PROSPECTS AND OPPORTUNITIES

Further development of e-commerce
Combining products
Greater emphasis on sustainability

CATEGORY DATA

Table 54 - Sales of Fragrances by Category: Value 2017-2022
Table 55 - Sales of Fragrances by Category: % Value Growth 2017-2022
Table 56 - NBO Company Shares of Fragrances: % Value 2018-2022
Table 57 - LBN Brand Shares of Fragrances: % Value 2019-2022
Table 58 - LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022
Table 59 - LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022
Table 60 - Forecast Sales of Fragrances by Category: Value 2022-2027
Table 61 - Forecast Sales of Fragrances by Category: % Value Growth 2022-2027

Hair Care in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Strong performance in 2022
Henkel maintains strong position
Focus on damaged hair

PROSPECTS AND OPPORTUNITIES
Online retailers attracting consumers with more affordable premium products
Increasing interest in sustainability
Positive outlook for styling agents

CATEGORY DATA
Table 62 - Sales of Hair Care by Category: Value 2017-2022
Table 63 - Sales of Hair Care by Category: % Value Growth 2017-2022
Table 64 - Sales of Hair Care by Premium vs Mass: % Value 2017-2022
Table 65 - NBO Company Shares of Hair Care: % Value 2018-2022
Table 66 - LBN Brand Shares of Hair Care: % Value 2019-2022
Table 67 - NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
Table 68 - LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
Table 69 - LBN Brand Shares of Premium Hair Care: % Value 2019-2022
Table 70 - Forecast Sales of Hair Care by Category: Value 2022-2027
Table 71 - Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
Table 72 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Fragrances seeing dynamic growth
Constraints on development of men-specific skin care
Orbico remains largest player

PROSPECTS AND OPPORTUNITIES
Potential in men's skin care
Multi-functionality and convenience key
Growing role for e-commerce

CATEGORY DATA
Table 73 - Sales of Men's Grooming by Category: Value 2017-2022
Table 74 - Sales of Men's Grooming by Category: % Value Growth 2017-2022
Table 75 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2019-2022
Table 76 - Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022
Oral Care in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Oral care continues to see demand boosted by pandemic effect
GlaxoSmithKline remains dominant
Looking for products with added benefits

PROSPECTS AND OPPORTUNITIES
Constraints on growth of electric and battery toothbrushes
Oral health problems to boost demand
Grocery shopping habits militate against dramatic e-commerce growth

CATEGORY DATA
Table 82 - Sales of Oral Care by Category: Value 2017-2022
Table 83 - Sales of Oral Care by Category: % Value Growth 2017-2022
Table 84 - Sales of Toothbrushes by Category: Value 2017-2022
Table 85 - Sales of Toothbrushes by Category: % Value Growth 2017-2022
Table 86 - Sales of Toothpaste by Type: % Value Breakdown 2018-2022
Table 87 - NBO Company Shares of Oral Care: % Value 2018-2022
Table 88 - LBN Brand Shares of Oral Care: % Value 2019-2022
Table 89 - Forecast Sales of Oral Care by Category: Value 2022-2027
Table 90 - Forecast Sales of Oral Care by Category: % Value Growth 2022-2027

Skin Care in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS
New formats gaining in popularity
Consumers used to at-home treatments and showing growing interest in maintaining a youthful appearance
L’Oréal leads, while Beiersdorf has top brand

PROSPECTS AND OPPORTUNITIES
Potential for development of Korean cosmetics trend
Less is more
Social media marketing to support e-commerce growth

CATEGORY DATA
Table 93 - Sales of Skin Care by Category: Value 2017-2022
Table 94 - Sales of Skin Care by Category: % Value Growth 2017-2022
Table 95 - NBO Company Shares of Skin Care: % Value 2018-2022
Table 96 - LBN Brand Shares of Skin Care: % Value 2019-2022
Table 97 - LBN Brand Shares of Premium Skin Care: % Value 2019-2022
Table 98 - Forecast Sales of Skin Care by Category: Value 2022-2027
Table 99 - Forecast Sales of Skin Care by Category: % Value Growth 2022-2027

Sun Care in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Health and wellness trend supporting growth
Sun protection used as part of daily skin care routines
Beiersdorf leads through Nivea

PROSPECTS AND OPPORTUNITIES
Search for online information to support e-commerce growth
Trend towards natural formulations
Health and wellness trend a double-edged sword

CATEGORY DATA
Table 100 - Sales of Sun Care by Category: Value 2017-2022
Table 101 - Sales of Sun Care by Category: % Value Growth 2017-2022
Table 102 - Sales of Sun Care by Premium vs Mass: % Value 2017-2022
Table 103 - NBO Company Shares of Sun Care: % Value 2018-2022
Table 104 - LBN Brand Shares of Sun Care: % Value 2019-2022
Table 105 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022
Table 106 - Forecast Sales of Sun Care by Category: Value 2022-2027
Table 107 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

Premium Beauty and Personal Care in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Rising consumer awareness driving demand for premium products
Fragrances recover to pre-pandemic levels, while premium men's grooming category sees growth
L'Oréal remains far ahead of rivals

PROSPECTS AND OPPORTUNITIES
Growth across categories
Players to invest in premium segment
Growing awareness of ingredients used in premium products

CATEGORY DATA
Table 108 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022
Table 109 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 110 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
Table 111 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022
Table 112 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2022-2027
Table 113 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2022-2027

Mass Beauty and Personal Care in Slovenia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Popularity of discounters supports private label growth
Mass products targeting natural and organic trend, while e-commerce eats into direct selling’s sales
Beiersdorf retains lead

PROSPECTS AND OPPORTUNITIES
Organic and natural trend moving further into mass segment
Mass products set to perform well in everyday essentials
Mass segment adapting to evolving consumer trends

CATEGORY DATA
Table 114 - Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
Table 115 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 116 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
Table 117 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
Table 118 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
Table 119 - 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.