



Beauty and Personal Care in Croatia

April 2024

Table of Contents

Beauty and Personal Care in Croatia

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Strong sales growth in baby and child-specific sun care spurred by tourists

Derma-cosmetics gain ground in response to rising prevalence of skin conditions

Gentler formulations overtakes colourful packaging as key demand factor

PROSPECTS AND OPPORTUNITIES

E-commerce set to increase in importance in baby and child-specific products

Value for money to come to the fore as high inflation means pressure on incomes

Croatia's falling birth rate presents a consistent, long-term threat to sales growth

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hand sanitisers a category in decline during the post-pandemic era
Private label bath and shower products gain ground as consumers seek value
Intense competition in the retailing of bath and shower as e-commerce builds

PROSPECTS AND OPPORTUNITIES

Health and wellness set to become a more important trend in bath and shower
Hand sanitisers set to continue experiencing declining demand
High inflation and pressure on spending to influence demand for bath and shower

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

A strong performance for facial make-up as BB/CC creams storms ahead
Demand for colour cosmetics continues to grow despite pressure on spending
The trend towards the layering of make-up presents new sales opportunities

PROSPECTS AND OPPORTUNITIES

Consumers unlikely to trade down to cheaper options despite pressure on spending
Huge opportunities for multi-purpose products to come to the fore
Social media and e-commerce to increase in importance as technology improves

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Deodorant sprays remains dominant due to convenience and effectiveness
Low demand for value-added variants as consumers opt for cheaper deodorants
Trend three

PROSPECTS AND OPPORTUNITIES

Maturity of demand to compromise sales growth potential
Deodorant wipes set to emerge strongly as consumers demand convenience
Fierce loyalty to the leading brands set to continue defining sales of deodorants

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Products with an ecological and/or natural positioning gain ground in depilatories
Demand under pressure due to preference for professional hair removal services
Few changes in the competitive landscape as the dominant leaders remain in charge

PROSPECTS AND OPPORTUNITIES

More natural products set to continue gaining ground
Modest increases in demand ahead as depilatories face stiff competition
Major changes in the retail distribution of depilatories unlikely to be seen

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pressure on discretionary spending suppresses demand for premium fragrances
Online sales of counterfeit fragrances present increasingly stiff competition
Fragrances with fresh, botanical scents that evoke nature continue to do well

PROSPECTS AND OPPORTUNITIES

Natural fragrances set to gain ground as part of the wider ecological trend
E-commerce set to gain ground in fragrances
Innovation and new product launches set to spur sales growth in fragrances

CATEGORY DATA

Table 54 - Sales of Fragrances by Category: Value 2018-2023

Table 55 - Sales of Fragrances by Category: % Value Growth 2018-2023

Table 56 - NBO Company Shares of Fragrances: % Value 2019-2023

Table 57 - LBN Brand Shares of Fragrances: % Value 2020-2023

Table 58 - LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023

Table 59 - LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

Table 60 - Forecast Sales of Fragrances by Category: Value 2023-2028

Table 61 - Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

Hair Care in Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

More diversity in product ranges as consumers look for a wider range of hair care

"Hair cycling" a key trend with the potential to broaden hair care consumption

Rising demand for hair care as consumers spend more time outside of the home

PROSPECTS AND OPPORTUNITIES

"Hair cycling" to continue presenting opportunities to hair care brands

Sustainability to come to the fore despite pressure on consumer spending

Further growth ahead for e-commerce as more consumers look to online channels

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men's razors and blades booms as the long-term trend for beards begins to wane

Men's deodorants benefits from return to more active pre-pandemic lifestyles

E-commerce gains further ground as online shopping continues to appeal

PROSPECTS AND OPPORTUNITIES

Men's razors and blades to face stiff competition from personal grooming appliances

Mass brands to remain dominant despite premium brands gaining ground

The fashion for beards set to prove crucial for growth rates in men's shaving

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

- Table 77 - NBO Company Shares of Men's Grooming: % Value 2019-2023
- Table 78 - LBN Brand Shares of Men's Grooming: % Value 2020-2023
- Table 79 - LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023
- Table 80 - Forecast Sales of Men's Grooming by Category: Value 2023-2028
- Table 81 - Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

Oral Care in Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Oral hygiene educational campaigns support sales growth
- Products regarded as non-essential struggle to generate sales growth
- Growth in power toothbrushes stalls amidst an adverse economic situation

PROSPECTS AND OPPORTUNITIES

- Improving understanding of oral hygiene set to underpin stronger sales growth
- Demand still some way from reaching maturity due to poor oral hygiene habits
- Power toothbrushes stands to benefit from greater focus on oral hygiene

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 89 - Forecast Sales of Oral Care by Category: Value 2023-2028
- Table 90 - Forecast Sales of Oral Care by Category: % Value Growth 2023-2028
- Table 91 - Forecast Sales of Toothbrushes by Category: Value 2023-2028
- Table 92 - Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Sales growth in skin care boosted by rising demand for more targeted products
- Social media continues to develop as a key source of information about skin care
- High-performance products gain ground despite pressure on consumer spending

PROSPECTS AND OPPORTUNITIES

- Positive growth ahead as consumers remain reluctant to skip their skin care routines
- E-commerce slated to gain ground in skin care over the forecast period
- The proliferation of personal care appliances poses a threat to category sales

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Buoyant inbound tourism flows support rising demand for sun care
Private label gains ground in sun care as high inflation erodes purchasing power
Rising concern over the skin damage caused by the sun underpins rising demand

PROSPECTS AND OPPORTUNITIES

Positive growth slated for sun care as consumers demand higher quality
Adverse economic conditions likely to influence consumer choices in sun care
E-commerce set to surge ahead in the distribution of sun care

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium brands gain ground, despite pressure on discretionary spending
L'Oréal maintains its leading position in premium beauty and personal care
Constant attention to marketing essential for success for premium brands

PROSPECTS AND OPPORTUNITIES

Deteriorating economic situation set to put pressure on demand for premium brands
Consumers to demand more value from premium beauty and personal care brands
Premium skin care set to win big as consumers demand the ultimate in anti-ageing

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 Croatia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mass beauty and personal care benefits from adverse economic situation
E-commerce becomes a more important distribution channel for mass brands

Mass deodorants the big winner as consumers trade down to cheaper options

PROSPECTS AND OPPORTUNITIES

Mass beauty and personal care to benefit from lingering economic challenges

Broader distribution set to flow from the rising popularity of e-commerce

More natural products set to proliferate in response to rising consumer demand

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.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-croatia/report.