

Beauty and Personal Care in Bosnia and Herzegovina

April 2024

Table of Contents

Beauty and Personal Care in Bosnia and Herzegovina

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Baby and child-specific witnessed steady demand

Rising consumer interest in skin care for babies and children

Millennials and Gen Z parents are key target audiences

PROSPECTS AND OPPORTUNITIES

Demographic shifts will test the resilience of baby and child-specific products

Sun care faces promising outlook

E-commerce to support growth of baby and child-specific products

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising inflation hampers volume sales but drives private label penetration

Hand sanitisers lose further appeal

Vast range of product launches occur in 2023

PROSPECTS AND OPPORTUNITIES

Slowdown expected in bath and shower compared to the review period

Niche product categories face promising growth

Liquid soap to outperform bar soap

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slight recovery in volume growth

Consumers economise as cost of living remains high

Direct sellers focus on latest trends as the channel faces falling share

PROSPECTS AND OPPORTUNITIES

Innovation and development to drive growth momentum

BB/CC creams to retain dynamism in upcoming years

Price inflation expected to linger in early forecast period

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers economise in deodorants as prices remain high

Deodorant sticks buck the downward trend

Beiersdorf AG pushes Nivea brand with a range of product launches

PROSPECTS AND OPPORTUNITIES

Steady yet slow growth outlook in deodorants

Growing consumer interest in deodorant wipes

E-commerce faces solid growth prospects in 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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers prioritise and reduce consumption of depilatories

Women's pre-shave posts volume growth in 2023

Procter & Gamble doo is the clear leader

PROSPECTS AND OPPORTUNITIES

Depilatories to witness muted volume growth

Women's pre-shave to grow slightly ahead of other categories

Multinationals to consolidate lead in depilatories

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium fragrances outperform mass counterparts

Consumers switch to fragrances sets/kits

Men continue to invest in fragrances as women prioritise other beauty products

PROSPECTS AND OPPORTUNITIES

Fragrances to witness steady demand

Premium fragrance sets/kits to record the strongest growth

Fragrances that support health and wellbeing to emerge

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stable consumer demand for hair care

Perms and relaxants lose appeal

Innovation plays a key role in shaping growth

PROSPECTS AND OPPORTUNITIES

Hair care to witness stable performance despite maturity and demographic limitations

Hair loss treatments and salon professional hair care to perform well

E-commerce to grow from a low base in hair care

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stable demand for men's grooming products

Men's premium hair care outperforms mass alternatives

Mass brands launch new men's grooming products

PROSPECTS AND OPPORTUNITIES

Men's grooming faces challenges to volume sales from social and political issues

Mass products will benefit from consumers' need to economise

Premium men's grooming to expand with scope for new brands to enter

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Oral care records stable performance

Battery toothbrushes grow from low base

Dental floss is key focus of product development by local player

PROSPECTS AND OPPORTUNITIES

Oral care is expected to witness muted growth

Battery toothbrushes to benefit from growing demand for convenience and innovation

Strong sales opportunity in denture care as population ages

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Skin care enjoys healthy growth in 2023

Premiumisation trend embeds itself further in skin care

Asian skin care trend emerges in Bosnia and Herzegovina

PROSPECTS AND OPPORTUNITIES

Growing consumer interest in skin care will underpin sales

Premiumisation to impact skin care

E-commerce sales to rise supported by product and brand diversification

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

Sun Care in Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sun care sales fall due to poor seasonal weather

Aftersun benefits from late hot summer

Baby and child-specific sun care registers volume sales decline

PROSPECTS AND OPPORTUNITIES

Sun care sales to be supported by further travel recovery in the post-pandemic era

Increased travel and holiday making to fuel sun care sales

Strong outlook for baby and child-specific 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 Bosnia and Herzegovina.

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium beauty and personal care posts promising growth

Growing supply of premium goods to meet consumer demand

Premium hair care portfolios expand in beauty specialist stores

PROSPECTS AND OPPORTUNITIES

Premium segment to remain agile meeting consumer demand for innovative products

Skin care and colour cosmetics to witness strong growth in premium segment

E-commerce to fuel development of premium segment

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Steady recovery of mass beauty and personal care

Mass segments draws attention as consumers economise

Consumer demand falls for mass sun care and mass fragrances

PROSPECTS AND OPPORTUNITIES

Premium segment will grow at faster pace as innovation captures the attention of consumers

Mass face masks to grow at a strong pace with support of innovation

E-commerce growth to remain steady over the forecast period

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-bosnia-and-herzegovina/report.