



# Beauty and Personal Care in North Macedonia

April 2024

Table of Contents

## Beauty and Personal Care in North Macedonia

### 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 North Macedonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Marginal increase in constant value sales, as inflation still bites

Pampers holds on to top spot

Consumers increasingly concerned about the environment

#### PROSPECTS AND OPPORTUNITIES

Downward demographic trends hamper growth potential over forecast period

Sun care best performer over forecast period

Products for sensitive skin an increasing focus

### 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 North Macedonia

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Fall in volume sales in 2023  
Multinationals continue to dominate  
Several launches within bath additives

## PROSPECTS AND OPPORTUNITIES

New product launches keep consumers engaged  
Consumers look for clean labels with less additives  
Premium registers higher constant value growth than mass

## 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 North Macedonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Some volume growth, in spite of rising prices  
BB/CC creams register highest volume growth  
Continuous product launches keep consumers engaged

#### PROSPECTS AND OPPORTUNITIES

Discounts drive volume sales  
Clean movement gathers momentum  
Digital channels play increasing role

#### 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 North Macedonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fall in constant value sales cuts into profit margins  
Multinationals have strong foothold  
Natural ingredients and fewer chemicals in demand

## PROSPECTS AND OPPORTUNITIES

Negative outlook over forecast period

Potential for growth of premium deodorants, with a more natural positioning

Manufacturers focus on various different benefits to stimulate growth

## 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 North Macedonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fall in constant value sales, as inflation still bites

Competitive landscape remains fairly consolidated

More differentiation needed with men's shaving

## PROSPECTS AND OPPORTUNITIES

Price main driver of value sales

Focus on natural ingredients in hair removers/bleaches

Women's pre-shave to see fastest growth

## 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 North Macedonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Women's fragrances more price sensitive

Leading players benefit from the shift to premium brands, while direct sellers offer value-for-money prices

Continued launches keep consumers engaged

## PROSPECTS AND OPPORTUNITIES

Premium fragrance sets/kits perform strongly

Online space increasingly important

Aggressive price promotion over forecast period

## 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 North Macedonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Constant value sales on par with previous year

Salon professional hair care registers highest value growth

Continued product launches keep consumers engaged

#### PROSPECTS AND OPPORTUNITIES

Trend of triple washing hair bolsters growth

Product launches expected in the natural and organic space

Styling agents register highest value growth

#### 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 North Macedonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fall in constant value sales, as inflation still bites

Premium men's skin care star performer

More niche brands increasing visibility

#### PROSPECTS AND OPPORTUNITIES

Population decline dampens volume sales

Skin care strong performer over forecast period

Men's grooming more segmented and specialised

#### 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 North Macedonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Fall in volume sales in 2023
- Battery toothbrushes and denture care stronger performers
- Multinational players continue to dominate due to lack of local production

#### PROSPECTS AND OPPORTUNITIES

- Moderate growth over forecast period
- Barriers to entry remain strong
- Online space widens offerings

#### 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 North Macedonia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Some volume growth, despite rising prices
- Beiersdorf maintains its lead, offering innovative, advanced formulas
- Continuous product launches keep consumers engaged

#### PROSPECTS AND OPPORTUNITIES

- Growing demand for Asian skin care brands
- Premium anti-agers continue to be in demand
- Shift towards multifunctional products over forecast period

#### 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 North Macedonia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Fall in volume sales in 2023

Local player retains lead

Blurring of lines between skin care and sun care

#### PROSPECTS AND OPPORTUNITIES

Positive outlook over forecast period

Brands innovate mainly by offering different formats

Increasing demand for premium 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 North Macedonia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Rising costs hit profit margins

CM Dela widens gap with Coty

Body care strong performer in 2023

#### PROSPECTS AND OPPORTUNITIES

Premium deodorants and premium hair care strong performers over forecast period

Growing competition from higher quality mass brands

Product launches focus on natural and environmentally-friendly.

#### 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 North Macedonia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Consumers price sensitive

Mass skin care performs strongly

Digital channels increasingly drive sales

## PROSPECTS AND OPPORTUNITIES

Price discounting and promotions drivers of value sales

A more natural approach over forecast period

Adult sun care and anti-agers strong performers over 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-north-macedonia/report](http://www.euromonitor.com/beauty-and-personal-care-in-north-macedonia/report).