

Beauty and Personal Care in the Czech Republic April 2024

Table of Contents

Beauty and Personal Care in the Czech Republic

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shift in lifestyle preferences, as well as growing knowledge amongst parents regarding the significance of using safe and natural products Increasing shift towards cheaper products for children above 3 years-old

Sustainability more pronounced

PROSPECTS AND OPPORTUNITIES

Premium, dermocosmetic and sustainable products will continue to drive the category

Baby and child-specific sun care set to remain the most dynamic category

Private label set to live up to its good reputation

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
- $\textbf{Table 16 LBN Brand Shares of Baby and Child-specific Skin Care: } \% \ Value \ 2020-2023$
- 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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bath and shower most impacted by trading down towards cheaper alternatives and private label Bar soaps remains popular, but struggles in terms of volume sales

Added value, such as increased hydration/essential oils or deep relaxation, plays important role

PROSPECTS AND OPPORTUNITIES

Refillable bottles and pouches to take significant share in the bath and shower category

Wellbeing trend and new formats to boost sales of bath additives

General volume decline of bath and shower products to continue in the early forecast years

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Post-pandemic growth continues in 2023 in both retail value and volume

Added benefits and convenience boost demand for specific colour cosmetics products

Press-on nails unexpected new power player

PROSPECTS AND OPPORTUNITIES

Line between colour cosmetics and skin care will continue to blur

Technological advances are likely to change how consumers shop for colour cosmetics

Premium brands are expected to continue to gain traction and grow faster than mass market alternatives

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stick deodorants the preferred format

Budget constrained consumers seek better value and trade down to less expensive alternatives Beiersdorf reduces CO2 footprint of deodorant aerosol cans

PROSPECTS AND OPPORTUNITIES

International brands likely to maintain their dominant positions

More natural formulations and deodorants free of chemicals will gain more ground

CATEGORY DATA

Competition set to intensify

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increasing cost of laser hair removal and home IPL temporarily boosts sales of depilatories products

Discounters gain further market share as consumers seek cheaper alternatives

Women's pre-shave products drive growth due to new formats

PROSPECTS AND OPPORTUNITIES

Growth potential remains fragile, with only marginal value and volume growth expected

Discounters set to grow in popularity

Online sales of depilatories likely to increase over the forecast period

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Robust sales driven by premium fragrances

Refillable fragrance growing on popularity

Premium unisex fragrances and sets remained popular during the review period

PROSPECTS AND OPPORTUNITIES

Sustainability, neuroscience, and digital innovation

Premium fragrances set to perform well over the forecast period

E-commerce will remain one of the dominant channels

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Skinification trend penetrating the hair care category

Major retailer in hair care acquires competitor

Salon professional hair care continues healthy value growth, but volumes see further decline

PROSPECTS AND OPPORTUNITIES

Hair care set to see further retail value growth, but volume likely to remain under pressure

Styling agents forecast to see positive performance

The competitive landscape unlikely to see dramatic changes

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men's grooming posts solid retail value growth

The Italian brand, Borotalco, introduces its new men's line

Angry beards opens its first offline store

PROSPECTS AND OPPORTUNITIES

Positive trend expected over the forecast period

Sustainability will further penetrate the men's grooming category

Online sales will continue to perform well in coming years

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Toothpaste sees strong promotional activity

Demand for tooth whiteners continues to rise

Electric toothbrushes sees further polarisation

PROSPECTS AND OPPORTUNITIES

Products positioned as therapeutic set to remain popular

Electric toothbrushes to see further growth

Sustainable and clean products will gain further ground

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

SPF is main trend in skin care, while skinimalism increases in popularity

British cosmetics brand, Elemis, officially enters the Czech market

High inflation and rising prices continue to challenge volume sales, while retail value grows strongly

PROSPECTS AND OPPORTUNITIES

Longevity research set to become new influence with hope of making skin biologically younger

The outlook is positive

Personalisation and addressing specific skin problems to remain in spotlight in skin care categories

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sun care posts slower growth in 2023 across both mass and premium categories

New product development targeting families and high SPF boost sales

Self-tanning posts healthy growth in volume terms owing to social media campaigns

PROSPECTS AND OPPORTUNITIES

Brands likely to target year-round outdoor sports to increase penetration of sun protection

Outlook for sun care remains positive

Private label will continue to play important role across sun care

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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium categories continue to grow through desire to indulge and feel good

Niche category gains further appeal amongst Czechs

Affordable premium brands gain wider audience

PROSPECTS AND OPPORTUNITIES

E-commerce to remain in the spotlight

Consumers to see added value and eco-friendly products

Social media engagement will remain important 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 the Czech Republic

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mass beauty and personal care products focus on adding premium elements to support sales

Stronger inclination towards private label brands

Sun care amongst the most dynamic mass market categories

PROSPECTS AND OPPORTUNITIES

Value growth will be limited, with volume sales improving

Private label expected to thrive, responding to consumers' price sensitivity

Premiumisation trend will remain a major limiting force for mass market categories

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 focusing 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-the-czech-republic/report.