



# Beauty and Personal Care in Poland

May 2024

Table of Contents

## Beauty and Personal Care in Poland

### 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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Robust value growth in baby and child-specific sun care continues

Dermocosmetics maintain a strong position in baby and child-specific products

Surge in sustainable baby and child-specific products

#### PROSPECTS AND OPPORTUNITIES

Steady value growth expected, although volume sales to be impacted by falling population of children

Private label share set to rise further

Potential for continued growth for e-commerce

### 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 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 Poland

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

A renaissance in the use of bar soap  
Private label accounts for the highest share of sales  
Shift in sanitisation habits impacts sales of hand sanitisers

### PROSPECTS AND OPPORTUNITIES

Natural products expected to take the lead  
Wellness trend remains strong, which will support a holistic approach to health  
Bar soap set to continue gaining traction

### 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 Poland

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

A surge in sales of colour cosmetics leads to full recovery after the pandemic disruption  
Facial make-up remains in vogue  
Lip products continues to gain value growth momentum, although sales remain lower than in 2019

### PROSPECTS AND OPPORTUNITIES

Growth expected across categories, but consumers' expectations are rising  
Generation Z set to stimulate sales of colour cosmetics as players cater to their preferences and demands  
The rise of multifunctional products, and blurring across categories

### 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 Poland

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Continued growth for deodorants after pandemic impact  
Growth in deodorant sprays hampered by maturity and other issues  
Natural ingredients take centre stage, with an emphasis on cleanliness and sustainability

#### PROSPECTS AND OPPORTUNITIES

A moderate growth outlook for deodorants  
Dominance of global brands expected to continue  
Sales via e-commerce set to grow, but remain small

#### CATEGORY DATA

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 Poland

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Boost to sales of depilatories as lives normalise post-pandemic  
Efficiency and convenience take priority  
Rising popularity of depilatory creams

#### PROSPECTS AND OPPORTUNITIES

Laser depilation likely to be a strong future competitor  
Sustainability and natural ingredients set to influence depilatories  
Wide product range benefits sales through health and personal care stores

#### 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 Poland

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Fragrances maintains dynamic value growth, but volume growth stalls  
Premium fragrances continues to drive value growth, but value sales of mass fragrances are also on the rise  
Unisex fragrances gain popularity

#### PROSPECTS AND OPPORTUNITIES

Fragrances which embrace wellbeing expected to rise in popularity  
Synthetic ingredients anticipated to gain traction

Sustainable fragrances set to continue to rise

#### 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 Poland

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Continued strong growth for hair care as consumers' lives normalise

Expansion of the range of products used drives growth

Although multinationals lead the way, local brands and private label perform well

##### PROSPECTS AND OPPORTUNITIES

Natural products set to continue to become more important

E-commerce poised for continued growth, although store-based retailers will remain dominant

The rise of "hair skinification" expected to drive sales

#### 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 Poland

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Complete recovery of volume sales in men's grooming

Multifunctional vs. targeted products

Demand for men's skin care and hair care products rises

##### PROSPECTS AND OPPORTUNITIES

Efficiency and minimalism important to younger consumers

E-commerce expected to become even more important

Spa and wellness set to be the next big thing in men's grooming

## 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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Oral hygiene gradually seeing improvement in Poland

Multinational brands dominate oral care

Denture care sees the fastest value growth

### PROSPECTS AND OPPORTUNITIES

Positive growth prospects for oral care

Electric toothbrushes have gained popularity, and will maintain growth

Tooth whitening set to lose importance due to concerns about oral and general health

## 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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Skin care continues to flourish in 2023, with exceptional value growth

Facial care leads sales and sees dynamic growth, especially premium products

L'Oréal maintains its lead, and Bielenda acquires Torf Corporation

### PROSPECTS AND OPPORTUNITIES

New brands and innovations set to constantly emerge

Explosion in sales of dermocosmetics set to continue

Expansion of private label skin care lines

## 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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sun care witnesses robust growth, in a rebound after the pandemic decline

Premiumisation trend continues in sun care

L'Oréal leads, but private label also sees rising sales

### PROSPECTS AND OPPORTUNITIES

Sun protection for children set to rise later in the forecast period

Clean beauty trend also visible in sun protection

Importance of consistency and fragrance, and innovative formats

## 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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Premium beauty and personal care thrives in value terms amidst expanding consumer group and inflation

The "lipstick effect" persists in 2023

Multinationals characterise premium beauty and personal care, with L'Oréal maintaining its strong lead

### PROSPECTS AND OPPORTUNITIES

Growth prospects are optimistic in the forecast period

Sustainability and bio trends set to strengthen

Premiumisation trend expected to continue

## 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 Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Continued growth for mass beauty and personal care

In addition to price, quality also matters for consumers of mass products

Mass beauty and personal care is led by multinationals, although private label lines remain popular and compete strongly with brands

#### PROSPECTS AND OPPORTUNITIES

Importance of organic and natural ingredients will drive new launches

E-commerce expected to maintain growth in the mass segment

Players set to strengthen their omnichannel presence

#### 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 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-poland/report](http://www.euromonitor.com/beauty-and-personal-care-in-poland/report).