

# Beauty and Personal Care in Ukraine

April 2024

Table of Contents

## Beauty and Personal Care in Ukraine

### 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Baby and child-specific 2023 recovery stymied by falling birth rate and emigration

Baby and child-specific sun care records the strongest growth in 2023

Johnson & Johnson a stronger leader

#### PROSPECTS AND OPPORTUNITIES

Recovery of the birth rate will help drive growth in baby and child-specific products

Sun care will be most dynamic but unable to return to pre-war sales levels

Private label share expected to remain relatively low

### 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 Ukraine

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Positive growth in 2023 as companies recover from supply disruptions in the previous year  
Bar soap the most dynamic bath and shower category in 2023, albeit partly due to rising prices  
Evyap Trading leads, but local companies and private label well represented in bath and shower

### PROSPECTS AND OPPORTUNITIES

Positive, if gradually slowing, growth expected for bath and shower  
Bar soap expected to be most dynamic over the forecast period  
Health and personal care stores expected to increase shelf space for private label products

### 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 Ukraine

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Strong recovery for colour cosmetics in 2023  
Mass BB/CC creams the most dynamic product in bath and shower in 2023  
Leading player L'Oréal very active in terms of new product launches

### PROSPECTS AND OPPORTUNITIES

Increasing trend towards formulations with skin-friendly elements  
Premium other lash and brow make-up expected to record the fastest growth  
Retail e-commerce accounts for a fifth of retail value sales

### 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 Ukraine

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Deodorants begin to recover in 2023 from the decline seen a year earlier  
Roll-ons most dynamic, creams continue to decline  
Unilever and Beiersdorf dominate deodorants

## PROSPECTS AND OPPORTUNITIES

Positive growth expected for deodorants  
Roll-ons will be the most dynamic deodorant product  
Further development of dermocosmetic deodorants expected

## 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Depilatories on a recovery path in 2023  
Pre-shave records the strongest growth in 2023, but razors and blades remains the biggest category  
Procter & Gamble and Reckitt Benckiser dominate depilatories sales in Ukraine

## PROSPECTS AND OPPORTUNITIES

Competition from laser treatment will see hair removers and bleaches volumes declining  
Women's pre-shave expected to be most dynamic over the forecast period  
Further gains expected for retail e-commerce channel

## 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Fragrances begin to recover in 2023 from the major losses seen a year earlier  
Premium fragrances outperforming their mass counterparts in 2023  
Direct selling and e-commerce account for almost half of fragrances sales

## PROSPECTS AND OPPORTUNITIES

Positive growth expected for fragrances over the forecast period  
Men's fragrances to see faster growth, women's fragrances will continue to dominate sales

Beauty specialists will continue to lead sales

## 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Large pack sizes popular among consumers, particularly in standard shampoos

Medicated shampoos and salon professional hair care seeing strong growth

Strong gains made by Vichy Dercos help L'Oréal move into second place in 2023

### PROSPECTS AND OPPORTUNITIES

Positive growth expected for hair care

Further strong growth expected for medicated shampoos

Health and personal care stores lead, but e-commerce likely to add more share

## 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Men's grooming recording growth in 2023 after the decline seen a year earlier

Dynamic growth for premium men's deodorants and skin care

Procter & Gamble a strong leader in men's grooming

### PROSPECTS AND OPPORTUNITIES

Positive growth expected for men's grooming

Men's fragrances expected to see the fastest growth

E-commerce likely to continue gaining share

## 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Improving oral hygiene standards helping to drive sales

Manual toothbrushes outperforming power toothbrushes

Multinationals dominate oral care

### PROSPECTS AND OPPORTUNITIES

Positive growth expected in oral care

Battery toothbrushes to record the most dynamic growth

Niche categories like tooth whiteners expected to see growth

## 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Innovation helping to drive the development of the skin care category

La Roche-Posay helping to drive growth in premium general purpose body care

L'Oréal Ukraine takes over the leading position in skin care in 2023

### PROSPECTS AND OPPORTUNITIES

Segmentation and natural products expected to be in demand

Anti-agers expected to be most dynamic over the forecast period

Health and beauty specialists still lead but e-commerce continues to gain share

## 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Strong recovery in 2023 after the year-earlier collapse in sales

Premium aftersun sees very dynamic growth in 2023

La Roche-Posay takes over from Biokon as the leading brand

### PROSPECTS AND OPPORTUNITIES

Positive growth expected for sun care in Ukraine

Mass aftersun expected to be most dynamic over the forecast period

Biokon could continue losing share to La Roche-Posay and Weleda

## 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Strong recovery seen in premium beauty and personal care, driven by dermacosmetics

Premium aftersun records a particularly dynamic recovery in 2023

L'Oréal continues to strengthen its hold on premium beauty and personal care

### PROSPECTS AND OPPORTUNITIES

Premium beauty and personal care will continue its recovery

Strong growth expected for premium other lash and brow make-up

Premium make-up categories set for dynamic performances

## 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 Ukraine

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Affordability helps drive growth in mass beauty and personal care in 2023

Mass sun care a strong performer in 2023

Cosnova the most dynamic player in mass beauty and personal care in 2023

#### PROSPECTS AND OPPORTUNITIES

Growth expected throughout the forecast period

Mass lipstick to perform strongly as women look to have a greater variety of colours

New launches expected from Mary Kay and Biokon

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