



Polish Investment  
& Trade Agency  
PFR Group

# THE COSMETICS SECTOR

**Poland.** Business Forward



**Poland is an internationally acclaimed destination for:**



**Pristine nature**  
A top 10 country to visit according to Lonely Planet



**A place where East meets West**  
Dynamic business hub at the heart of Europe



**Vibrant food scene**  
Warsaw among Top 10 Vegan-Friendly Cities in the World



**Great cities**  
Wrocław – most business friendly medium – sized European city (2022)  
Kraków – a TOP 25 Travellers’ Choice 2022  
Łódź – in the „Best of the World 2022” List by National Geographic



**Attractive place for expats**  
Young, increasingly international society, with a very high level of English proficiency



**Rich history**  
Vast legacy of bravery and resilience



WHY  
POLAND



FACTS ABOUT THE  
POLISH COSMETIC  
SECTOR



WHAT MAKES  
US DIFFERENT



DID YOU KNOW  
THAT



SUPPORT  
INSTITUTIONS



HOW WE CAN  
HELP YOU

## Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

## Superb market share

40% of the region's total GDP and a gateway to the wider EU market

## Large, high-quality talent pool

300k+ of well-educated graduates annually

## Resilient economy

Max score for Macroeconomic Stability in the Global Competitiveness

Almost 30 years of continuous growth

Almost 10 years of stable growth in foreign trade turnover

## Transparent

Regional leader in the Transparency International Corruption Index

## FDI magnet

2nd in the EU, 5th in the world in terms of value of new greenfield projects (2020)

One third of all FDI stock in the region

## Top-notch infrastructure

1st in CEE in Airport Connectivity & Quality of Road Infrastructure  
(Global Competitiveness Report)

## Ratings remain high despite the turbulent Times

Moody's: A2, S&P: A-, Fitch: A-, as of the first half of 2022

## Competitive, well-developed cities

European Cities of the Future (fDi Intelligence)

Warsaw: 7th position (ahead of Berlin and Stockholm)

Kraków: 2nd in EU in Business Friendliness among Large Cities



# FACTS ABOUT THE POLISH COSMETIC SECTOR



The value of the Polish cosmetics market in 2021 was: €3,9 bn. By 2024 the cosmetics market is estimated to be worth at €4.6 bn.



The Polish cosmetics industry is the 5th in the EU (in terms of market value).



Skin care cosmetics and personal care products account for almost 63% of Polish cosmetics export (H1 2022).



The value of Polish cosmetics export was: €3.9 bn (2021). Countries of the European Union are the main destinations.

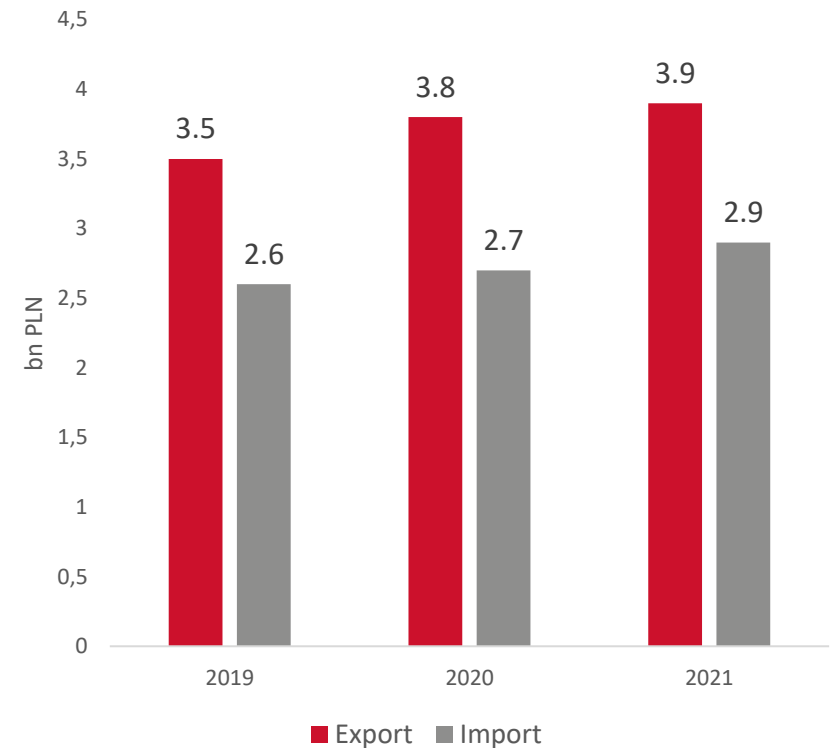


TOP 10 export destinations (H1 2022):  
Germany, the UK, Czechia, Belgium, Russia, France, Italy, the Netherlands, Spain, Ukraine



There are 1,277 manufacturers of perfumes and personal care products (according to official Polish „REGON” register).

Polish foreign trade figures - cosmetics



Source:  
PKO BP, „Monitoring Branżowy”  
Statistics Poland, official „REGON” register  
Cosmetics Europe, “Cosmetics and personal care industry overview”

# WHAT MAKES US DIFFERENT



## HIGH QUALITY PRODUCTION METHODS

required by the EU's regulations and standards.

## INVESTMENT IN R&D AND INFRASTRUCTURE

There are many independent research laboratories in Poland. They create a well-developed network of centres carrying out microbiological, physical, chemical, dermatological and other specialist studies, needed in the cosmetic industry.

## INNOVATIONS AND SUSTAINABILITY

Polish cosmetics offer innovation and respond to global beauty trends, taking particular care for sustainability and eco-friendliness. We use local and natural ingredients.



## A DEVELOPED MARKET WITH ESTABLISHED TRADITIONS

More than 100 years of experience and tradition. The leaders of the Polish cosmetics industry sector grew out of traditional family-owned businesses.

## QUALIFIED PEOPLE

The number of facilities in education, cosmetology faculties and cosmetic chemistry is steadily growing. 125 academic institutions offer cosmetology and cosmetics chemistry courses.



## CREATIVITY AND FLEXIBILITY

Small and medium-sized manufacturers can easily adjust to the requirements of a changing market. Their production lines are short; therefore, the production process can be changed quickly as required. A wide range of products that can meet the needs of different customers on various markets.

Source:  
Kosmetyczni.pl, The Polish Union of the Cosmetics Industry  
OPI PIB, RAD-on database

# DID YOU KNOW THAT



Every second cosmetic product manufactured in Poland is exported.

Globally, every 3rd hybrid nail polish is produced in Poland.

Cosmetics outlets and chemists are the largest distribution channels for cosmetics in Poland. In 2021, these channels accounted for over 40% of sales.

In 2022, the cosmetics market in Poland is forecast to grow by 6.1% y-o-y, to approximately 27.7 bn PLN. That would be the highest increase since 2009.

71% of all cosmetic companies in Poland are Polish entities which provide a strong position for local manufacturers on the domestic market (despite the competition from global brands).

Source:  
PKO BP, „Monitoring branżowy”  
Chemiaibiznes.pl, „Rekordowa dynamika rynku kosmetycznego w 2022 roku”

# SUPPORT INSTITUTIONS

## The Polish Union of the Cosmetics Industry

The Polish Union of the Cosmetics Industry exclusively represents and supports the strategic goals of entrepreneurs in the cosmetics industry. For 20 years it has been an active voice of the sector in the lawmaking process. It collaborates effectively with Polish and European administrative institutions on a daily basis, and together with its member companies it creates and implements solutions that help develop the Polish cosmetics market, which today is 5th in the European Union.

The Union brings together nearly 220 companies, including cosmetics producers and distributors, laboratories, consulting companies and teaching centres, as well as their industry partners – suppliers of packaging and raw materials. It unites and works on behalf of startups, small family businesses, as well as large international corporations and major Polish cosmetics companies, which work together effectively in an atmosphere of mutual respect and trust, while maintaining all the rules of competition.



The Polish Union  
of the Cosmetics  
Industry

## The Polish Association of Cosmetic and Detergents Industry

The Polish Association of Cosmetic and Detergent Industry (PACDI) supports the development of cosmetic and detergent manufacturers since 1992. It provides them with knowledge on industry's legal requirements and obligations – both at a national and EU level. Committed to creating a conducive environment for the sector. PACDI's members are manufacturers and distributors, retailers, raw material suppliers, laboratories and others.





# The Polish Investment and Trade Agency

The Polish Investment and Trade Agency's (PAIH) mission as a Government Agency is:

- To enable small- and medium-sized companies to reach their full potential in exporting their products and services around the world
- To support potential investors in Poland by providing comprehensive and up-to-date information services regarding legal and tax aspects, location and human capital, as well as on the available financial incentives
- To promote 'Poland as a Brand'

## How we can help

PAIH's experienced team of experts with a hands-on approach and excellent understanding of the needs of entrepreneurs will ensure that your projects will move as fast and smooth as possible.



**Information packs**  
macroeconomic, HR,  
legal, sectoral data



**Analysis  
of export  
potential**



**Preparing  
information  
packs**



**Verifying  
business  
partners**



**Organising  
business  
missions**



**Preparing lists  
of possible  
business partners**



**Organising  
B2B meetings**



**Support in contacts  
with Government  
Agencies**

# Contact us

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Strategy and Business Promotion Department,  
September, 2022



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