



Ztor HORIZON

Competitive Benchmarking
and Strategic Analysis for the
Italian Haircare Sector

Case study: TRI*****OS S.p.A.

Reference benchmark: PET***ON COS***** S.p.A.



A Strategic
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Export Intelligence for Italian Companies

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Ztor

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In the professional haircare sector , the ability to anticipate international market movements is what distinguishes a simple exporter from a truly strategic player.

With **Ztor HORIZON** , TRI*****OS was able to observe its global presence through an objective lens for the first time: the analysis of customs flows, average prices by HS code, and the purchasing trends of professional distributors in the main target countries.

The starting point for developing a strategic export plan for TRICOBOTICS was a structured benchmark with PET***ON, one of the most solid Italian references in professional haircare at the international level.

This comparison allowed us to identify:

- in which areas of the world was PET***ON growing fastest;
- where demand for products similar to TRI*****OS was accelerating;
- which channels, distributors and price ranges were most effective in scaling brand value.

PET***ON analysis

Below is an in-depth analysis of PET***ON Spa's export flows, based on a dataset of 8,714 customs transactions from January 2024 to September 2025.

Highlights

- **Main Markets:** Exports are heavily concentrated in Ukraine, the Russian Federation, Mexico, and Ecuador, which together account for over 75% of the total value. Ukraine emerges as the largest market by value, although Ecuador records the highest number of transactions.
- **Top Buyers:** The top three importers – PRO SALON SA DE CV (Mexico), ООО ИФБ (Russia) and ТОВ ТІКЦАХ (Ukraine) – alone generate almost 35% of the total value, highlighting a significant dependence on a small number of strategic partners.
- **Core Products:** Hair preparations (HS codes 330590 and 330510) form the backbone of exports, generating over 80% of the value. Demand is primarily driven by the Echos Line and Inebrya brands .
- **Growth Markets:** Vietnam, Mexico, and Panama show the most promising annualized growth rates, suggesting strong development potential. Conversely, historic markets such as the Russian Federation and Ukraine show significant declines in 2025 (partial data), driven by geopolitical factors.

Significant Anomalies: Numerous zero-value transactions were identified (14% of the total), concentrated in markets such as Costa Rica and Malaysia, likely related to sampling or triangulation. Significant price variations for the same product among different importers were also noted, suggesting different positioning strategies.

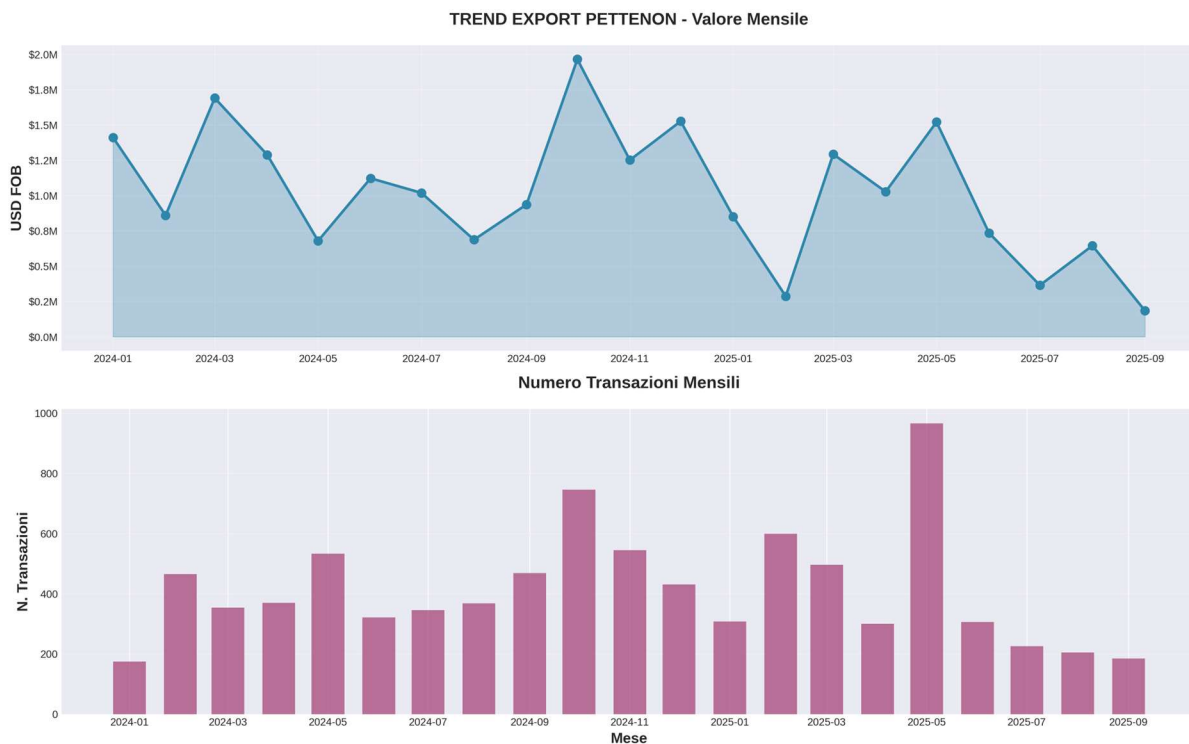
Strategic Conclusions

- 1 **Diversify Markets:** Reduce dependence on the Russian and Ukrainian markets by actively exploring opportunities in high-growth markets such as Vietnam and Mexico.
- 2 **Strengthen Strategic Partnerships:** Cultivate relationships with top buyers through loyalty programs and framework agreements, while simultaneously developing a plan to expand the customer base to mitigate risks.

- 3 Analyze Price Positioning: Investigating the causes of wide price variations for the same product. Understanding whether they stem from product variations, different sales channels, or local strategies can reveal margin optimization opportunities.
- 4 Clarifying Anomalies: Dig deeper into the causes of zero-value transactions and purchasing patterns of multi-country importers to uncover potential trade triangulations or hidden logistics hubs.

Analysis of Historical Flows and Trends

A temporal analysis of export flows reveals a volatile trend, with significant peaks alternating with periods of contraction. 2024 recorded a higher overall value than 2025 (partial data), suggesting a slowdown or a different seasonality in orders.



| Year | Total USD FOB Value | N. Transactions | No. of Single Importers | N. Unique Countries |
|------|---------------------|-----------------|-------------------------|---------------------|
| 2024 | \$14,437,023 | 5,123 | 74 | 18 |
| 2025 | \$6,910,312 | 3,591 | 65 | 20 |

Comments:

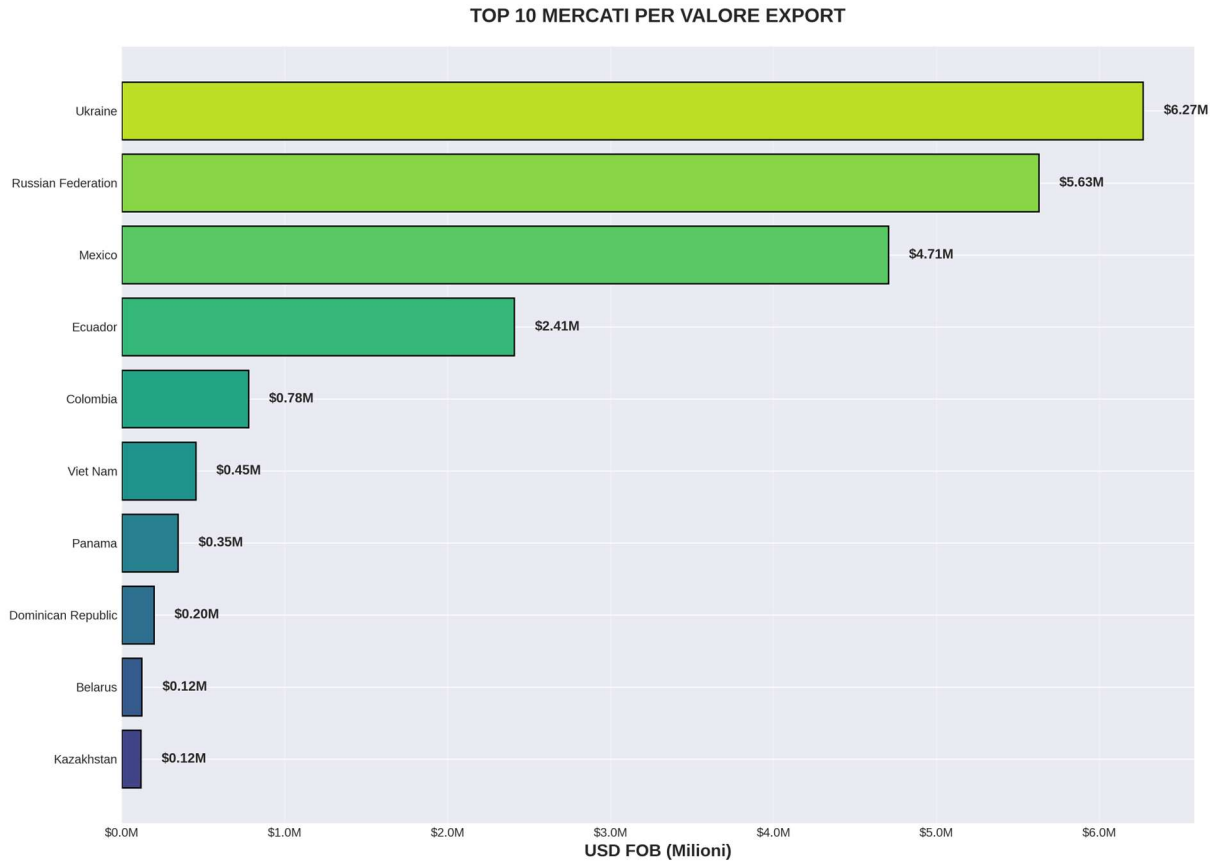
- The value of exports shows strong monthly variability, with peaks exceeding 4 million USD and lows below 1 million.

- The number of transactions does not always correlate with value, indicating a large variation in average order value.

Market and Product Mapping

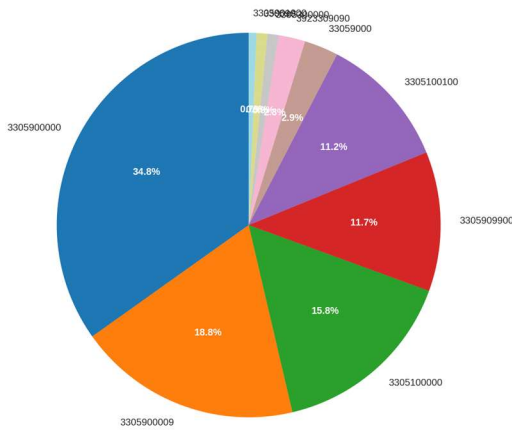
The analysis of the geographical and product distribution confirms a strong concentration of the business.

The Ukrainian and Russian markets dominate in value, followed by Mexico and Ecuador. These four countries represent the core of PET***ON's current business.

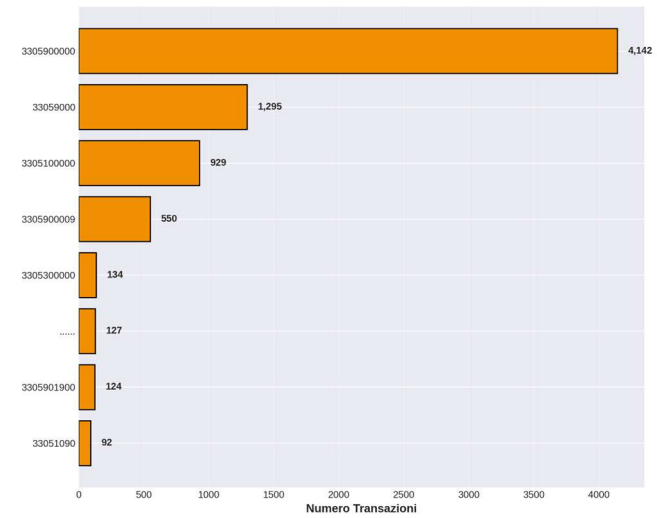


From a product perspective, hair preparations (HS 330590 and 330510) are predominant, covering almost all of the export turnover analysed.

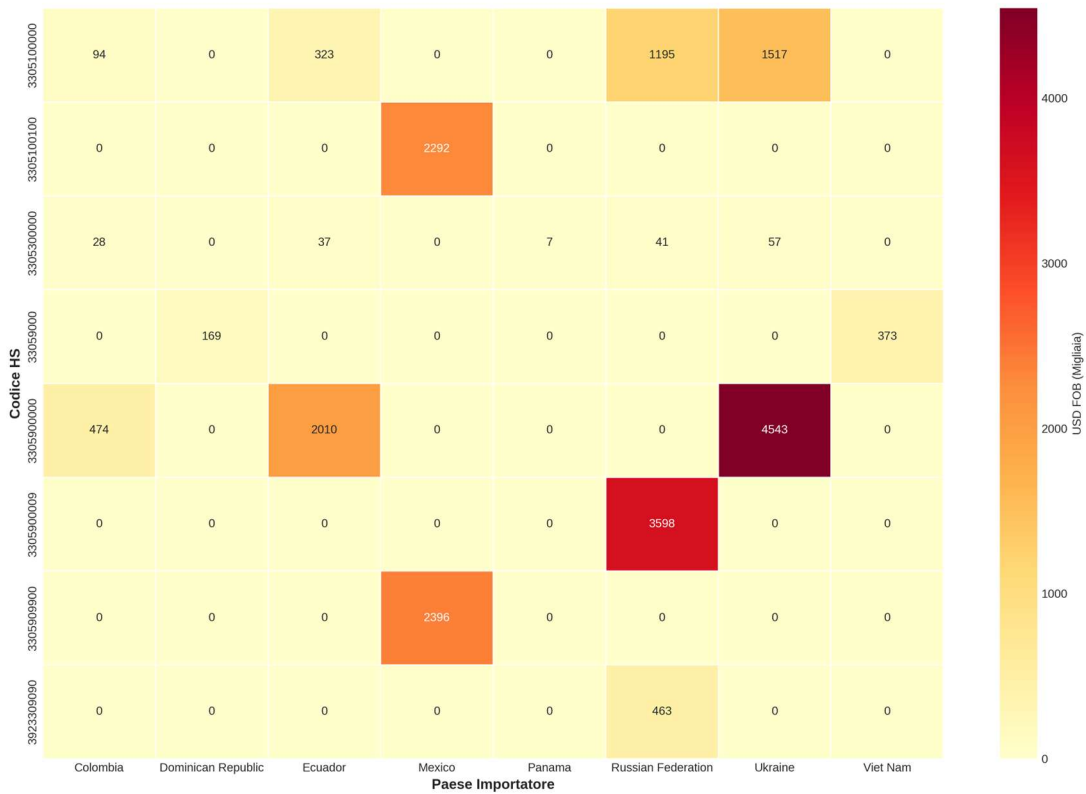
DISTRIBUZIONE VALORE PER CODICE HS (Top 10)



TRANSAZIONI PER CODICE HS (Top 8)



HEATMAP: VALORE EXPORT PER PRODOTTO (HS) x MERCATO

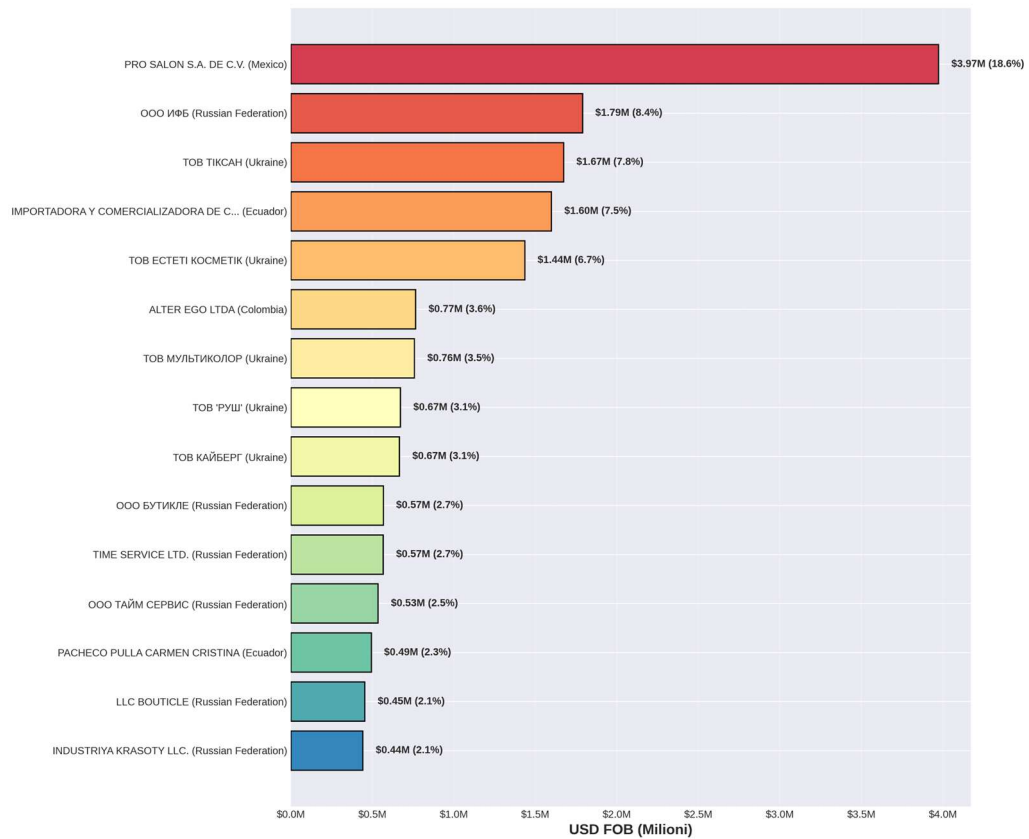


Top 15 Buyers by Value

The analysis allowed us to draw up a complete ranking of importers, identifying the most strategic partners and potential high-growth customers.

The ranking is dominated by a small number of large importers. The top 15 generate nearly 80% of the total export value, highlighting a high degree of business concentration.

TOP 15 BUYER PER VALORE EXPORT



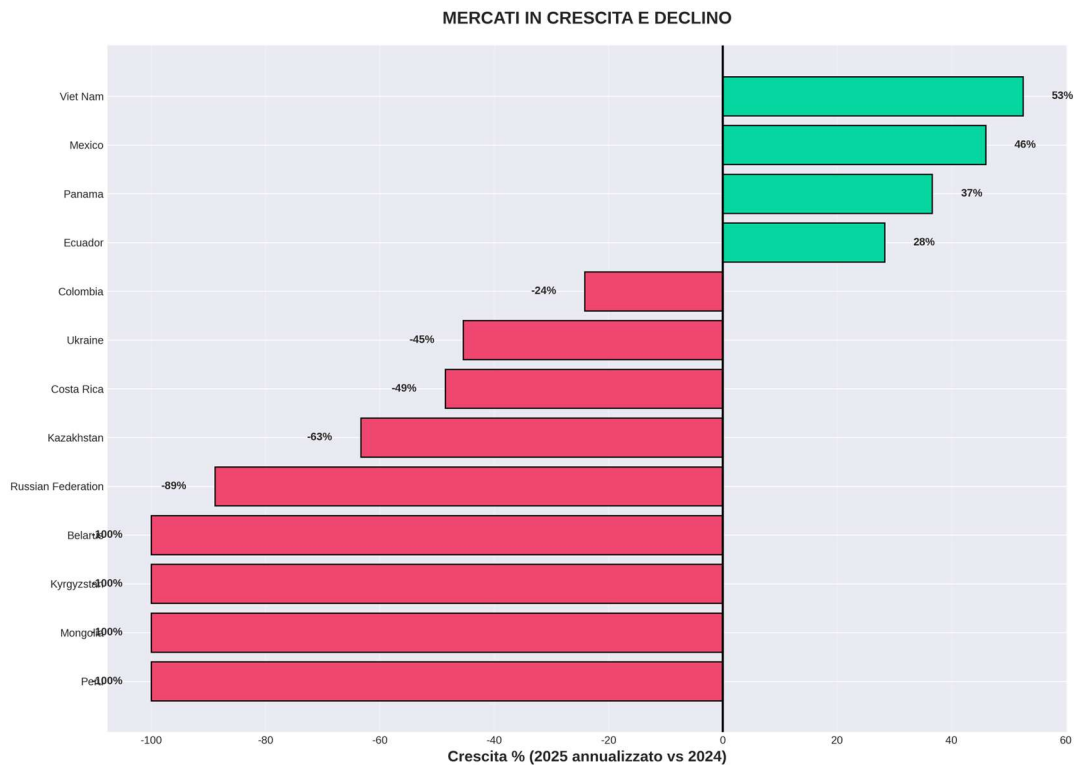
Profile of the Top 3 Buyers

| # | Importer | Village | USD FOB Value | % of Total | N. Transactions |
|---|--------------------|--------------------|---------------|------------|-----------------|
| 1 | PRO SALON SA DE CV | Mexico | \$3,972,164 | 18.61% | 159 |
| 2 | ООО ИФБ | Russian Federation | \$1,788,979 | 8.38% | 94 |
| 3 | ТОВ ТОКСАН | Ukraine | \$1,673,177 | 7.84% | 67 |

- PRO SALON SA DE CV (Mexico): The largest client overall, with a very high average transaction value. Focused almost exclusively on two product codes (3305100100 and 3305909900).
- ООО ИФБ (Russia): Second largest importer by value, with a strong dependence on the "KAPOUS" brand and a significant share of non-branded products.
- ТОВ ТОКСАН (Ukraine) : Third largest importer, with a price positioning in the medium range. It mainly purchases Inebrya brand products .

Markets in Growth and Decline

The comparative analysis between 2024 and 2025 (annualized) highlights diverging trends across markets.



- **Strong Growth** : Vietnam (+147%) and Mexico (+46%) emerge as the most dynamic markets, representing the main directions for future development.
- **Sharp Decline** : The Russian Federation (-89%), Kazakhstan (-63%), and Ukraine (-45%) are showing sharp declines, likely linked to geopolitical instability and market saturation. It is crucial to monitor the situation and evaluate risk mitigation strategies.

Importer Comparison and Positioning

A comparison between importers reveals very different purchasing strategies and market positioning.

Comments :

- **Premium Segment**: Customers such as ALTER EGO LTDA (Colombia) and TOV MULITKOLORO (Ukraine) purchase at significantly higher prices than average, despite having a lower market share. They represent a high-margin segment.
- **Medium Segment**: Includes the majority of strategic buyers, including TOV TOKCAN and IMPORTADORA BELHACOSMETIC. These customers balance large volumes with a mid-range purchase price.
- **Value Segment**: Some importers, despite moving significant volumes, position themselves in a lower price range. This may be due to purchasing different product lines or greater pressure on margins.

Strategic Plan for TRI*****OS Spa

This report provides a comprehensive strategic analysis for the international expansion of TRI*****OS SpA, an Italian company specializing in professional hairdressing products with a distinctive focus on hair health and wellness. The analysis is based on the import flows of four top buyers of PET***ON COS***** SpA, operating in the markets of Ecuador, Mexico, Russia, and Ukraine, for a total value of over \$16.5 million.

The analysis revealed a significant market opportunity for TRI*****OS, characterized by:

Unique and Differentiating Positioning: TRI*****OS stands out from its main competitors for its scientific-trichological approach, which focuses on hair health rather than color. This allows it to avoid directly competing with industry giants, instead positioning itself as a complementary partner with high added value.

Market Gap Identified: The portfolios of the buyers analyzed are strongly oriented towards hair color, with a lack of offerings in the specialized treatments and hair wellness segment. This gap represents the main strategic opportunity for TRI*****OS.

Alignment with Global Trends: TRI*****OS's positioning is perfectly aligned with key consumer trends: hair wellness, sustainability, a scientific approach, and clean beauty. The global professional haircare market will reach \$57.5 billion by 2033 (CAGR 5.3%).

| Market | Buyer | Import Value | PET***ON Quota | Opportunity Key | Priority |
|---------------|----------------|--------------|----------------|---|----------|
| **Ecuador** | BELHACOSMETICS | \$2.55M | 68.5% | Portfolio saturated with coloring, gap on treatments | ☆☆☆ |
| ** Mexico ** | PROSALONS | N/A | N/A | Values alignment and sustainability, 450+ partner network segment , diversification suppliers | ☆☆☆☆ |
| **Russia** | ООО ИФБ | \$12.33M | 14.5% | Dependence on a single supplier, need for diversification | ☆☆☆ |
| ** Ukraine ** | ТОВ ТІКАН | \$1.70M | 98.6% | | ☆☆ |

Value Proposition : Positioning as **"The Partner of Hair Wellness"** - complementary to hair color brands, not in competition.

Key Message : *"While others color, we take care of the health of the hair. Together, we offer a complete and high-value service for the end customer."*

Priority Entry :

1. **Mexico (PROSALONS)** - Value alignment on sustainability, extended network
2. **Ecuador (BELHACOSMETICS)** - Clear gap in treatments, training as leverage
3. **Russia (ООО ИФБ)** - Premium segment , Made in Italy as driver
4. **Ukraine (ТОВ ТІКАН)** - Portfolio diversification, risk reduction

Methodology and data sources

The analysis focuses on top PET**ON buyers and may not represent the entire market. Information on some competitors is limited by public data availability, and the geopolitical context (particularly for Russia and Ukraine) is subject to rapid changes that could impact the recommendations.

The analysis was conducted through a multi-methodological approach that integrates:

Quantitative Import Data Analysis : Processing of 4,217 import transactions with a total value of over \$16.5 million, extracted from the customs databases of Ecuador, Mexico, Russia, and Ukraine. The data includes information on exporters, FOB/CIF values, HS codes, countries of origin, and brands.

Desk Research and Web Intelligence : In-depth research on importing companies, competitors and market trends through primary sources (company websites, LinkedIn, B2B databases) and secondary sources (industry reports, McKinsey analysis, Allied Market Research).

Competitive Benchmarking : Detailed study of the positioning, communication, and storytelling of main competitors through the analysis of their websites, marketing materials, and online presence.

The data used comes from:

- ****Customs Database****: With import data from Ecuador, Mexico, Russia, Ukraine)
- Industry Report **: McKinsey "State of Fashion: Beauty 2025", Allied Market Research "Professional Hair Care Market"
- ****Company sources****: Websites, LinkedIn profiles, EMIS database
- **** Market Analysis ****: Statista, Fortune Business Insights, Grand View Research

IMPORT ANALYSIS

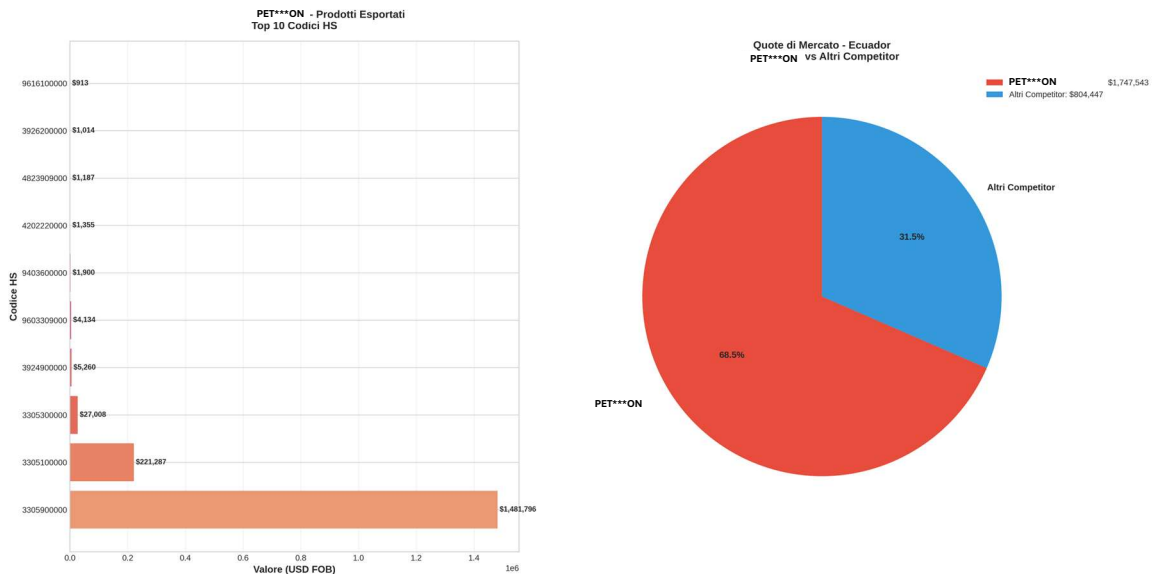
An analysis of the import flows of PET***ON's four top buyers reveals a dynamic and diversified market, with significant volumes and a strong presence of Italian suppliers. The total value of the analyzed imports exceeds **\$16.5 million**, with the Russian market dominating (\$12.3 million), followed by Ecuador (\$2.6 million) and Ukraine (\$1.7 million).

| Buyer | Village | Transactions | Total Value (USD) | Average Value per Transaction | Exporters Unique |
|------------------|---------|------------------|-------------------------|-------------------------------|------------------|
| BELHACOSMETICS | Ecuador | 3,390 | \$2,551,990 | \$753 | 15 |
| PROSALONS | Mexico | 378 | N/A | N/A | N/A |
| OOO IFB | Russia | 379 | \$12,327,404 | \$32,526 | 23 |
| TOV TOKSAN | Ukraine | 70 | \$1,696,567 | \$24,237 | 2 |
| **TOTAL** | - | **4,217** | **\$16,575,961** | - | - |

PET***ON Market Share

PET***ON COSMETICS holds a significant market share among all buyers analyzed, with particular predominance in Ecuador (68.5%) and Ukraine (98.6%). This confirms its position as a leading supplier, but also highlights an opportunity for TRI*****OS to position itself as a complementary alternative.

| Buyer | Village | PET***ON share (%) | PET***ON Value (USD) | PET***ON Transactions |
|-----------------------|---------|--------------------|----------------------|-----------------------|
| BELHACOSMETICS | Ecuador | 68.5% | \$1,747,543 | 2.332 |
| PROSALONS | Mexico | N/A | N/A | N/A |
| OOO IFB | Russia | 14.5% | \$1,788,979 | 94 |
| TOV TOKSAN | Ukraine | 98.6% | \$1,673,177 | 67 |



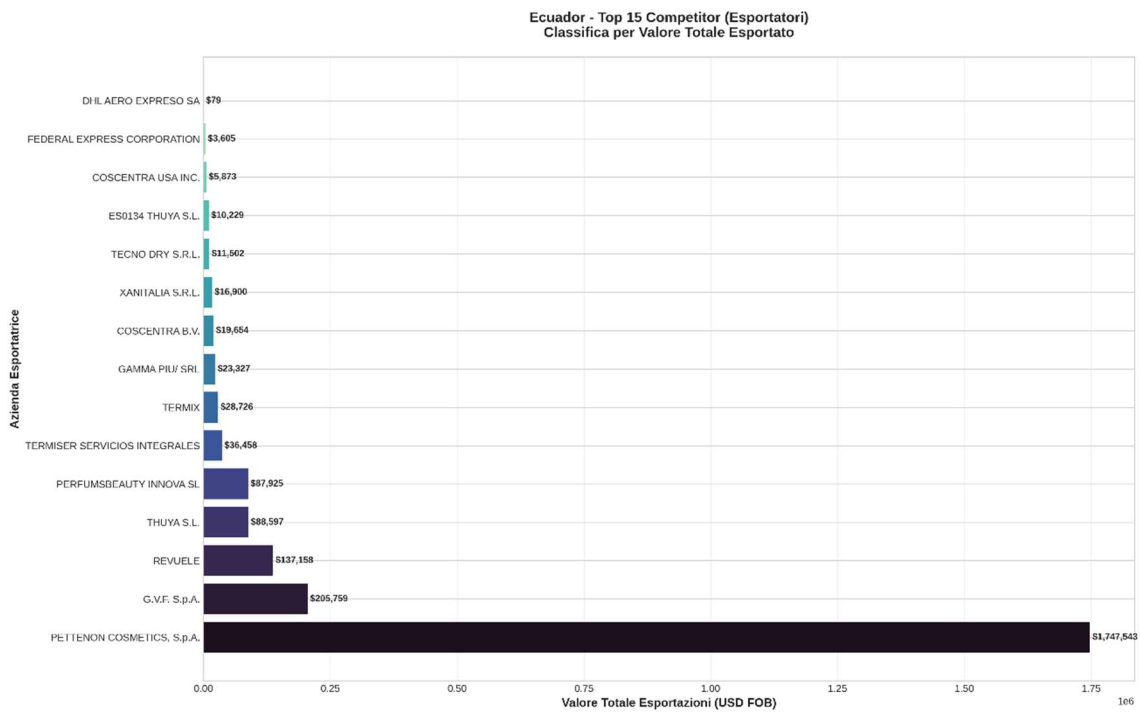
PET***ON Market Share

Target Market

Analysis : *Ecuador - BELHACOSMETICS*

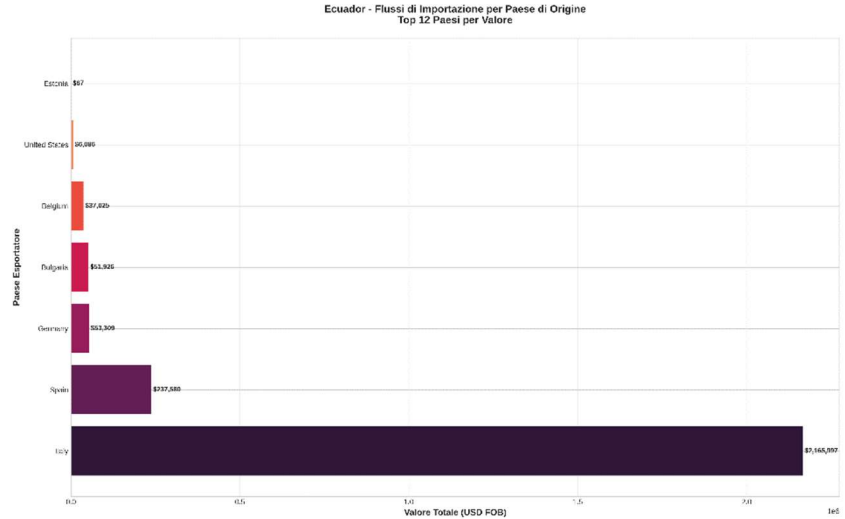
Belhacosmetics is the buyer with the highest number of transactions (3,390) and represents a mature market with a diversified portfolio of suppliers.

| Exporter | Village | Value (USD) | Share (%) | N. Transactions |
|-----------------------------|----------|-------------|-----------|-----------------|
| PET***ON COSMETICS | Italy | \$1,747,543 | 68.5% | 2.332 |
| GVFSpA | Italy | \$205,759 | 8.1% | 275 |
| REVUELE | Bulgaria | \$137,158 | 5.4% | 183 |
| THUYA SL | Spain | \$88,597 | 3.5% | 118 |
| PERFUMSBEAUTY INNOVA | Spain | \$87,925 | 3.4% | 117 |



Countries of origin

Italy leads the way with 80.6% of the total value, followed by Spain (7.4%) and Bulgaria (5.4%). This confirms the strong appeal of Made in Italy products in the Ecuadorian market.

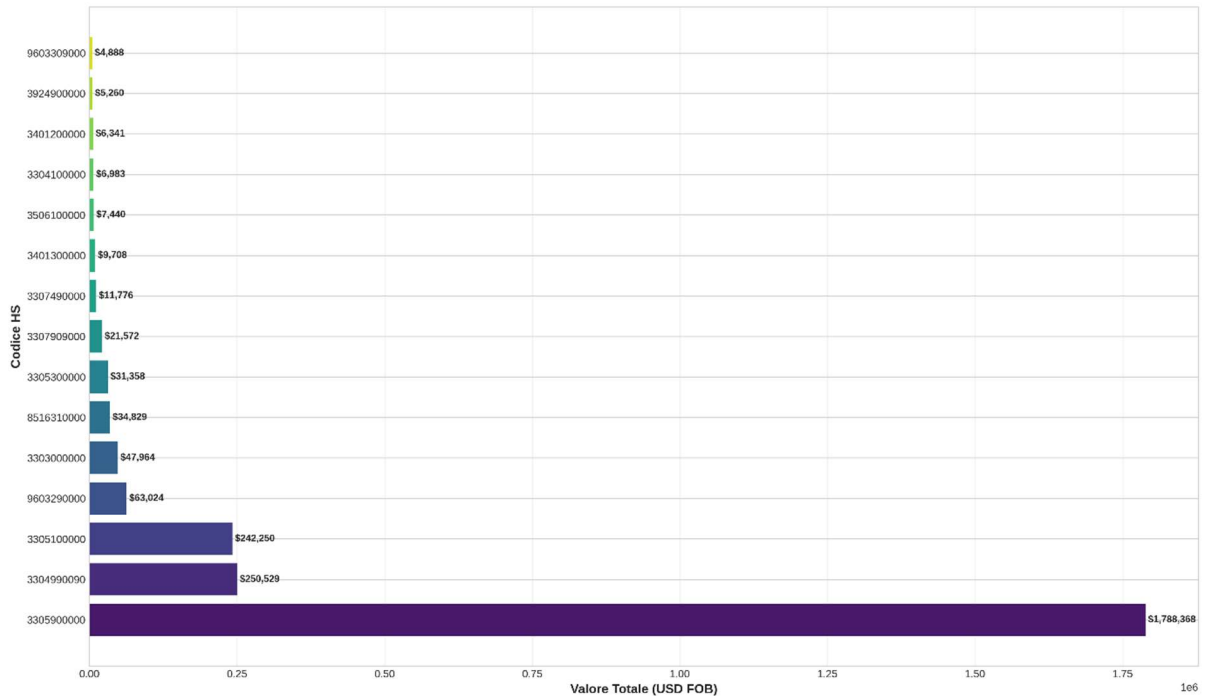


Main HS Codes :

The most important HS codes are:

- ** 3305100000 **: Shampoo (hair preparations)
- **3305900000 **: Other preparations capillaries
- **3304990000 **: Others beauty products

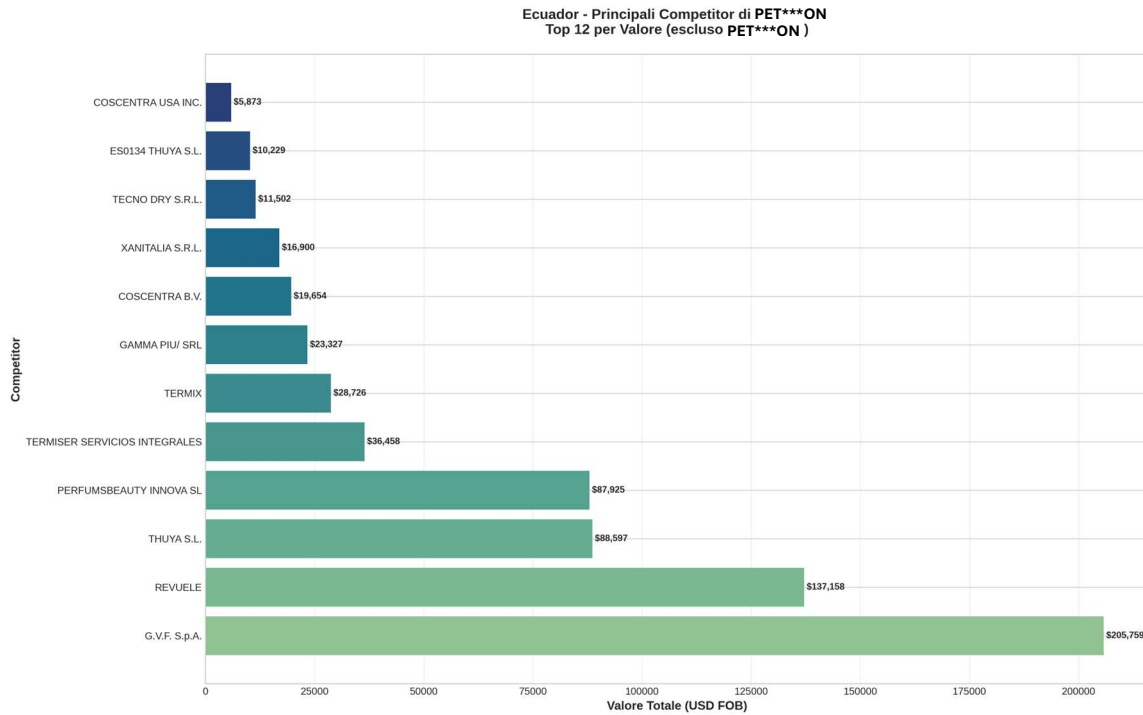
Ecuador - Volumi di Importazione per Codice HS Top 15 Codici per Valore



This

indicates a strong demand for hair care products, perfectly aligned with the TRI*****OS offering.

Main Competitors (excluding PET***ON)



Analysis by Target Market:

Mexico - P ROSALONS SA DE CV

Overview : ROSALONS, part of PSGroup , is a distributor with over 30 years of experience and a network of 450+ partners. Quantitative data is limited, but qualitative analysis reveals a company with strong sustainability values.

Key Features :

- Distribution network : 450+ partners
- I commit sustainability : Use energy solar
- Experience : 30+ years in market Mexican
- Portfolio: Professional Brands including Oyster Cosmetics

Opportunity : The value alignment on sustainability represents a strong point of contact with TRI*****OS.

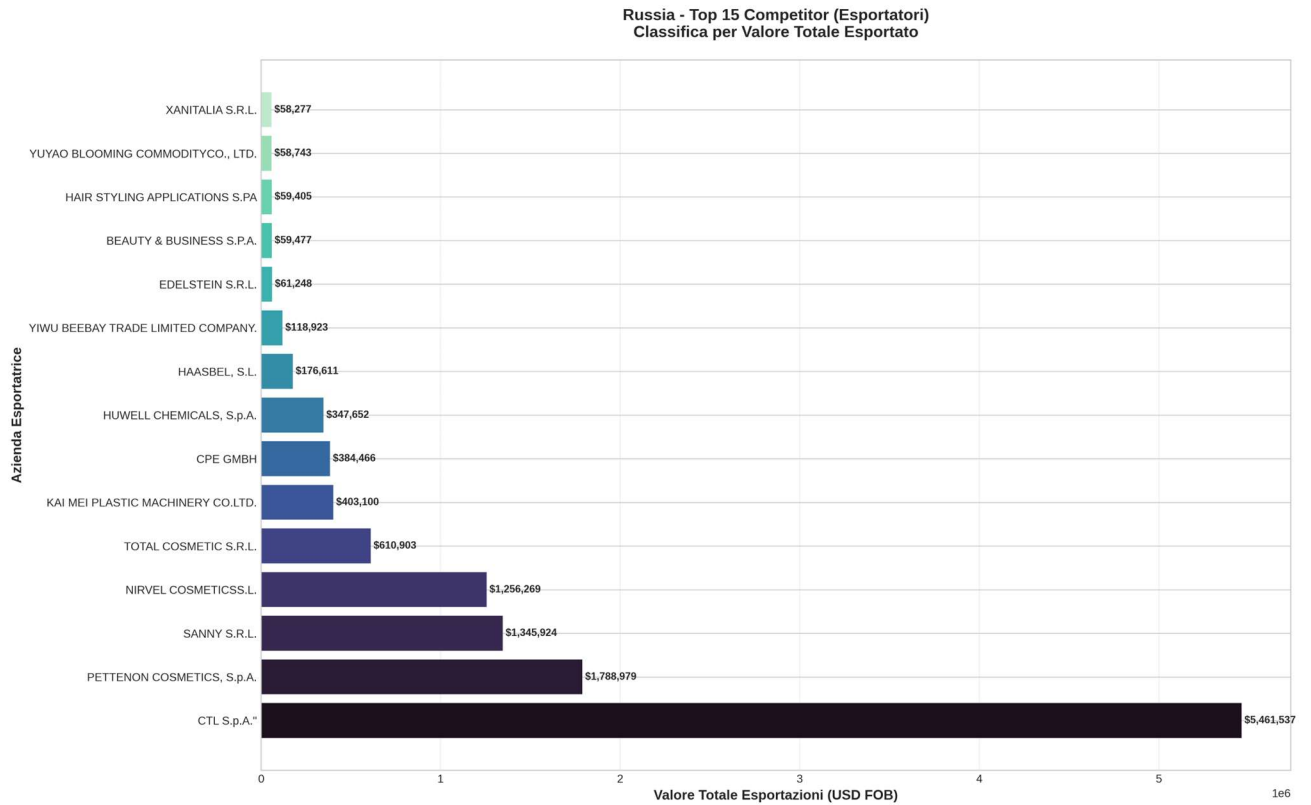
Target Market

Analysis : *Russian Federation OOO IFB.*

Overview : The Russian market shows the highest import value (\$12.3M) with greater supplier diversification than other markets.

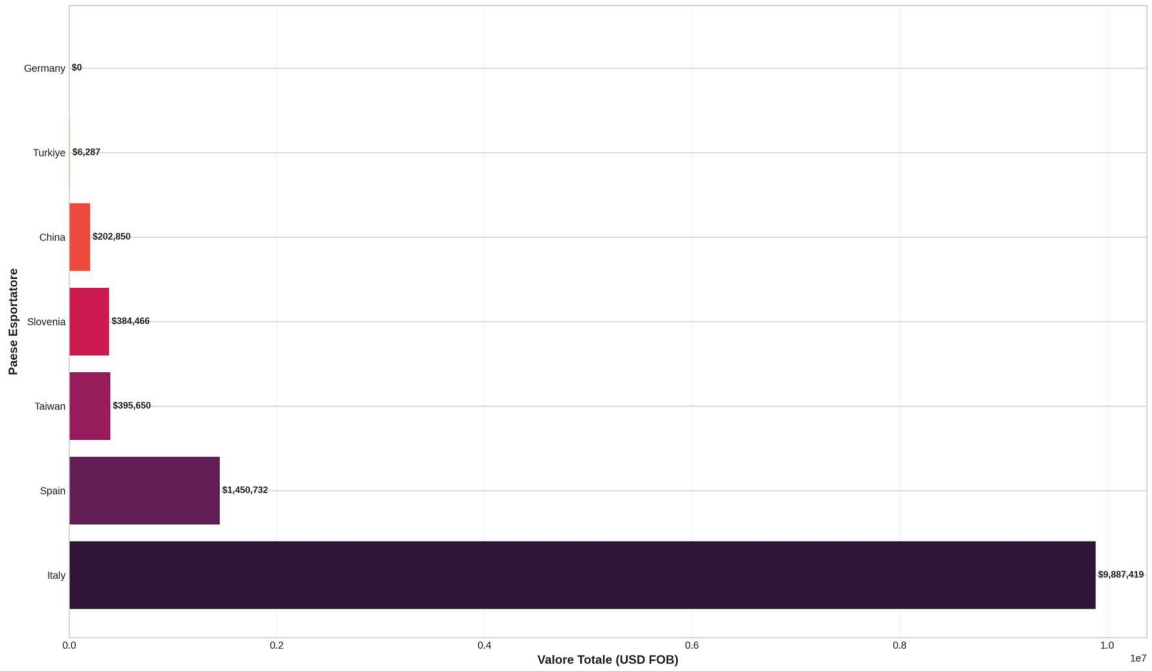
Main Exporters :

| Exporter | Village | Value (USD) | Share (%) | N. Transactions |
|------------------|---------|-------------|-----------|-----------------|
| CTL SpA | Italy | \$5,461,537 | 44.3% | 118 |
| PET***ON | Italy | \$1,788,979 | 14.5% | 94 |
| SANNY SRL | Italy | \$1,345,924 | 10.9% | 58 |
| NIRVEL COSMETICS | Spain | \$1,256,269 | 10.2% | 54 |
| TOTAL COSMETIC | Italy | \$610,903 | 5.0% | 26 |



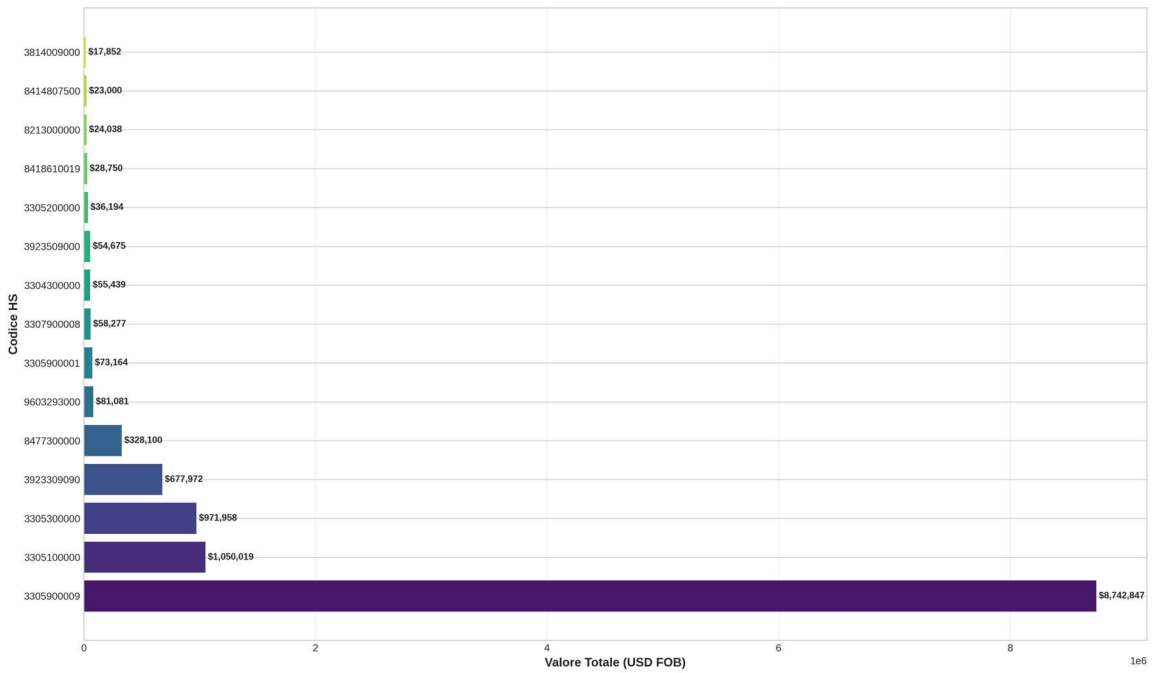
Countries of Origin :

Russia - Flussi di Importazione per Paese di Origine
Top 12 Paesi per Valore

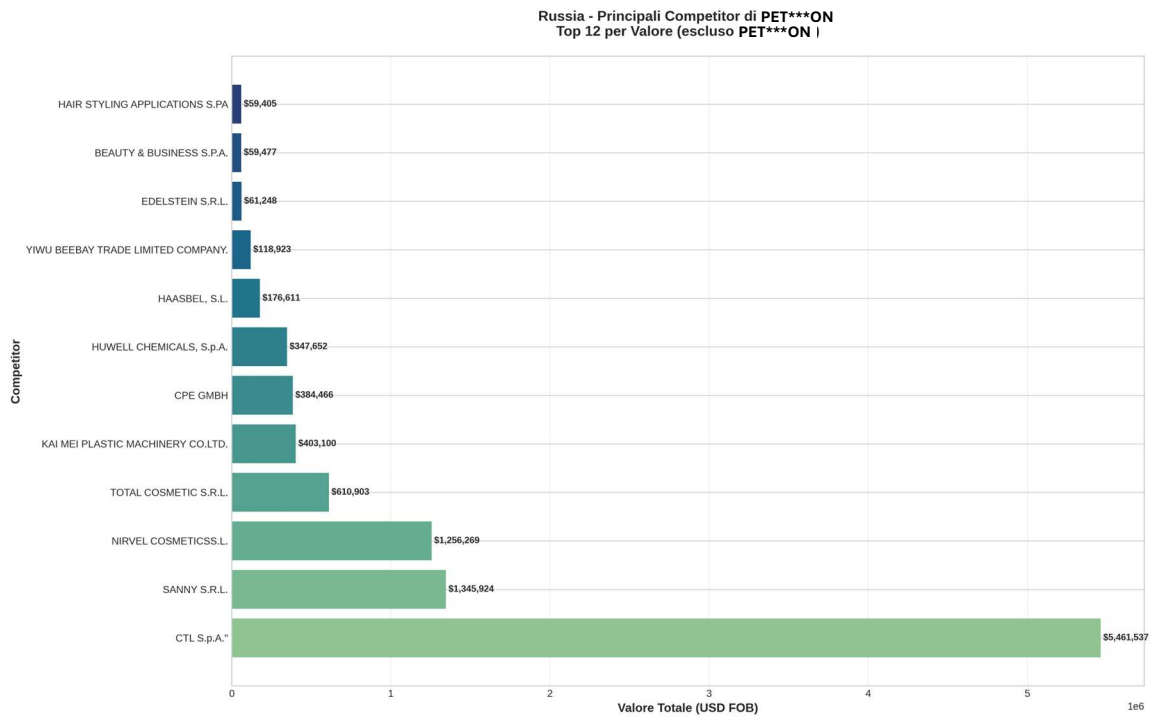


Main HS Codes :

Russia - Volumi di Importazione per Codice HS
Top 15 Codici per Valore



Main Competitors :



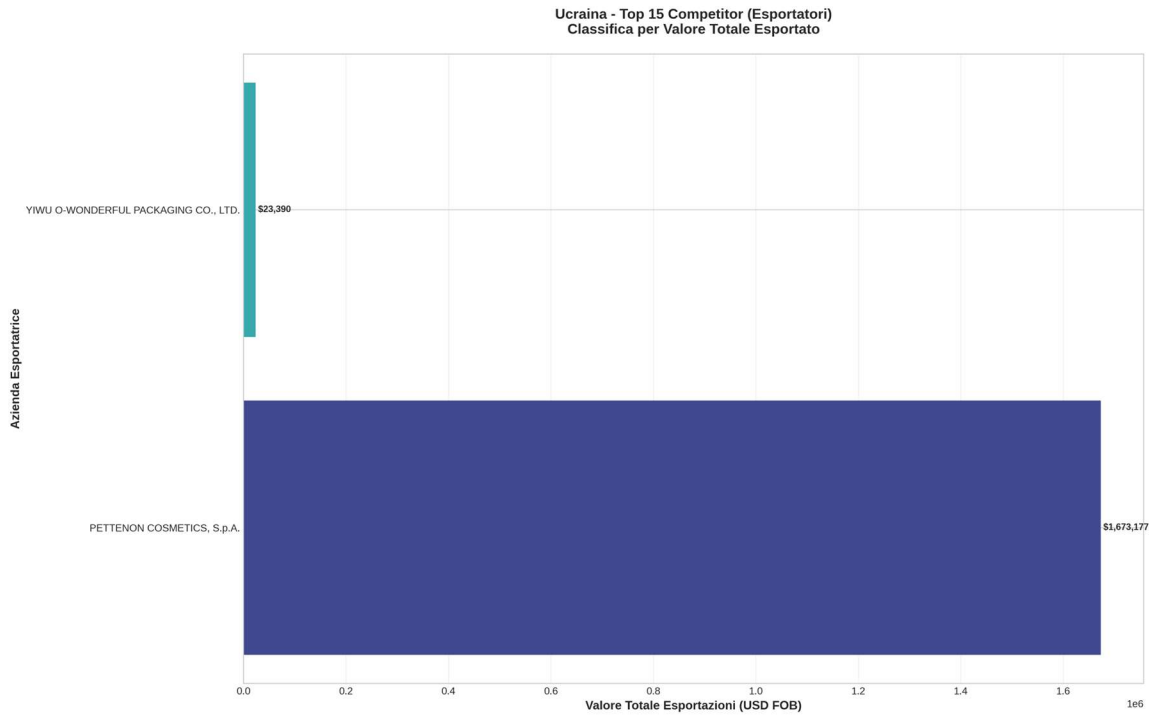
Target Market

Analysis : *Ukraine TOV TOKSA.*

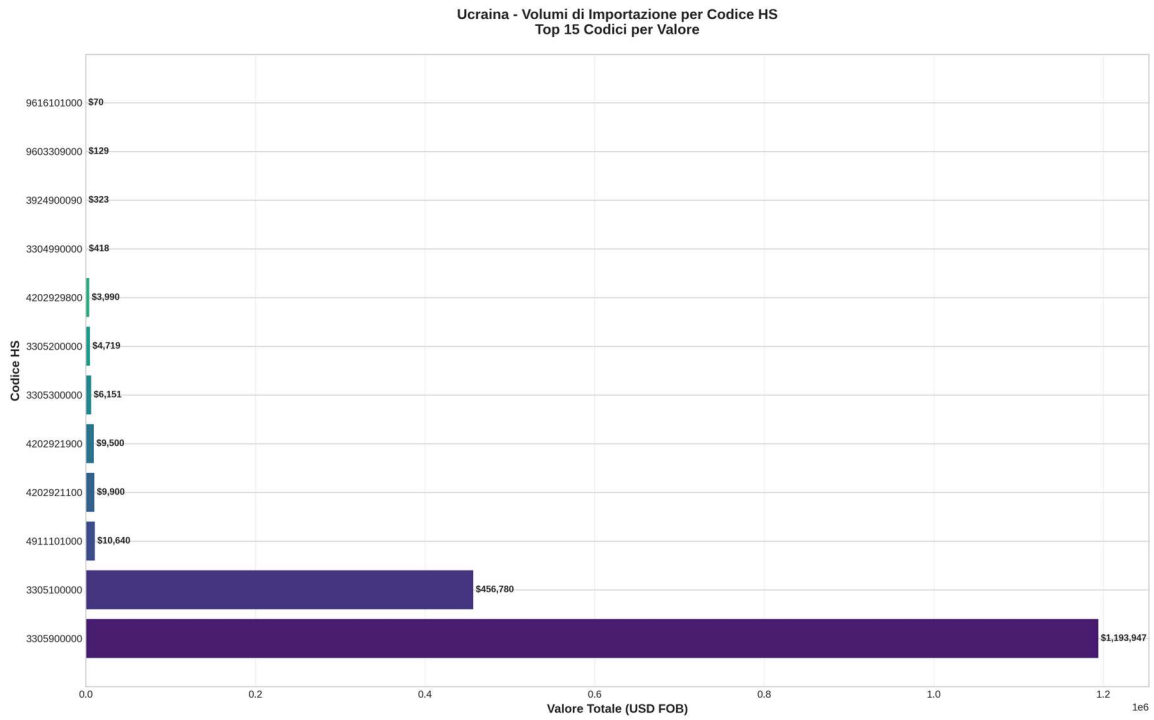
Overview : The Ukrainian market shows the highest concentration, with PET***ON holding 98.6% market share. This indicates a strong dependence on a single supplier and an opportunity for diversification.

Main Exporters :

| Exporter | Village | Value (USD) | Share (%) | N. Transactions |
|-------------------------|---------|-------------|-----------|-----------------|
| PET***ON | Italy | \$1,673,177 | 98.6% | 67 |
| YIWU O-WONDERFUL PKG | China | \$23,390 | 1.4% | 3 |



Main HS Codes



TOP BUYER PROFILES

IMPORTADORA BELHACOSMETICS SA (Ecuador)

Company Information :

- ****Full name****: Importadora y Comercializadora de Cosméticos Belhacosmetic SA
- ****Country****: Ecuador
- **** Headquarters ****: Guayaquil
- ****Sector****: Import and distribution of professional cosmetic products

Company Profile :

BELHACOSMETICS is a key importer and distributor of professional hair products in the Ecuadorian market. Analysis of import data reveals a company with a broad and diversified portfolio, primarily focused on hair color and hair care products.

Product Portfolio :

- Hair coloring products (predominant)
- Shampoos and conditioners professional
- Hair treatments
- Styling products
- Accessories professional

Main Suppliers :

- PET***ON COSMETICS (Italy) - 68.5% share
- GVFSpA (Italy) - Itely Hairfashion , Aquarely
- REVUELE (Bulgaria) - Skin care and hair care
- THUYA (Spain) - Nail and eyelash products
- PERFUMSBEAUTY INNOVA (Spain)

Business Features :

- Strong orientation towards the professional market (salons)
- Portfolio focused on Italian and Spanish brands
- High number of transactions (3,390) indicates widespread distribution
- Relatively low average transaction value (\$753) suggests frequent orders

Opportunities for TRI*****OS :

The BELHACOSMETICS portfolio is heavily saturated with hair color brands, with a clear gap in the specialized treatments and hair wellness segment. TRI*****OS can be positioned as:

- ****Complementary solution**** to existing hair color brands
- ****Treatment Specialist**** Pre and post coloring
- ****Training partner**** to raise the competence of client salons

- ****Differentiating brand**** with a scientific-trichological approach

Recommended Approach Strategy :

Organize training sessions and workshops on the benefits of the trichological approach, demonstrating how TRI*****OS protocols can increase customer loyalty and the average value of in-salon services. Emphasize complementarity with existing hair color brands.

PROSALONS SA DE CV - PSGroup (Mexico)

Company Information :

- ****Full name****: Prosalons SA de CV
- ****Group****: PSGroup
- ****Country****: Mexico
- ****Sector****: Distribution of professional beauty products
- **** Experience ****: 30+ years in market

Company Profile :

PROSALONS, part of PSGroup , is a well-established distributor in the Mexican market with a strong reputation and an extensive distribution network. The company stands out for its modern approach and strong commitment to environmental sustainability.

Distinctive Features :

Sustainability : PSGroup uses **solar panels** to power its operations, demonstrating a genuine commitment to reducing its environmental impact. This strongly aligns with TRI*****OS's values.

Distribution Network : With over **450 partners** including salons and local distributors, PROSALONS offers a widespread distribution network that can allow TRI*****OS to rapidly penetrate the Mexican market.

Experience and Reputation : 30+ years of experience in the professional beauty industry have built a solid reputation and established relationships with high-end salons.

Product Portfolio :

- Professional hair brands (including Oyster Cosmetics)
- Coloring products
- Treatments professional
- Accessories and equipment for salons

Company Values :

- Sustainability environmental
- Quality and innovation
- Long-term partnership term
- Customer support

Opportunities for TRI***OS :**

Value alignment on sustainability represents the main strength of the PROSALONS approach. Other favorable elements include:

- **Extended Network**: 450+ partners for rapid deployment
- **Complementarity**: Current portfolio focused on coloration (Oyster), gap on treatments
- **Shared values**: Sustainability, quality, innovation
- **Growth Market**: Mexico is a key market in Latin America

Recommended Approach Strategy :

Contact PROSALONS, emphasizing the alignment of values on sustainability and the shared vision of responsible business. Propose a strategic partnership that enhances the PROSALONS portfolio with a focus on hair health and wellness, attracting a new customer segment that is attentive to the environment and quality. Co-create a marketing campaign that unites the values of both brands.

OOO IFB (Russian Federation)

Company Information :

- **Full Name**: OOO IFB (OOO IFB)
- **Country**: Russian Federation
- **Sector**: Import and distribution of cosmetic products
- **Import Value**: \$12.3M (the highest among the buyers analyzed)

Company Profile :

OOO IFB is the buyer with the highest import value among those analyzed, indicating a large-scale operation and a strong presence in the Russian market. Unlike the other buyers, it displays greater supplier diversification, with PET***ON holding only 14.5% of the share.

Business Features :

- Very high average transaction value (\$32,526)
- Diversified portfolio with 23 suppliers unique
- Strong presence of Italian brands (CTL, PET***ON, SANNY, TOTAL COSMETIC)
- Competition intense Between suppliers Europeans

Main Suppliers :

- CTL SpA (Italy) - 44.3% share - Leading brand in the portfolio
- PET***ON COSMETICS (Italy) - 14.5% share
- SANNY SRL (Italy) - 10.9% share
- NIRVEL COSMETICS (Spain) - 10.2% share
- TOTAL COSMETIC (Italy) - 5.0% share

Target Market :

- Strong demand for premium and high-quality products

- Appreciation for Made in Italy
- Growing attention to health and well-being
- Segment professional sophisticated and demanding

Opportunities for TRI***OS :**

- ****Premium Segment****: Positioning Selective Professional as an exclusive brand for high-end salons
- ****Differentiation****: The scientific-trichological approach can distinguish TRI*****OS from the competition
- ****Diversification****: OOO IFB is already used to working with multiple suppliers
- ****Made in Italy****: Strong brand equity in market Russian

Recommended Approach Strategy :

Approach OOO IFB with a proposition focused on the Selective Professional brand, highlighting innovation, exclusivity, and premium positioning. Organize a presentation event in Russia (or webinar) to demonstrate the scientific approach and product benefits. Provide marketing materials in Russian and dedicated training support.

TOV TOKSAN (Ukraine)**Company Information :**

- ****Full Name****: TOB TIKCAH (TOV TIKSAN)
- ****Country****: Ukraine
- ****Sector****: Import and distribution of cosmetic products
- **** Import Value ****: \$1.7M

Company Profile :

TOV TOKCAN has the highest concentration of suppliers among the buyers analyzed, with PET***ON holding 98.6% of the market share. This indicates a very close and consolidated relationship, but also a potential vulnerability related to dependence on a single supplier.

Business Features :

- High average transaction value (\$24,237)
- Almost total dependence on PET***ON COSMETICS
- Portfolio focused on ECHOS LINE products
- Limited number of transactions (70) but of significant value

Suppliers :

- PET***ON COSMETICS (Italy) - 98.6% share - Almost exclusive supplier
- YIWU O-WONDERFUL PACKAGING (China) - 1.4% share - Packaging

Target Market :

The Ukrainian market, despite being impacted by the geopolitical situation, maintains demand for quality products. Features include:

- Appreciation for European and Made in Italy brands
- Price sensitive but with a growing premium segment
- Growing interest in natural and sustainable products

Opportunities for TRI***OS :**

- ****Portfolio Diversification****: Proposal to reduce the risk of dependence on a single supplier
- ****Complementarity****: Add treatment focus to existing color portfolio
- ****New Segments****: Attracting customers interested in hair health and wellness
- ****Resilience****: Offering a second quality Italian supplier

Recommended Approach Strategy :

Approach TOV TCKSAN with a portfolio diversification proposal, emphasizing the benefits of having a second, high-quality Italian supplier offering complementary products. Highlight how TRI*****OS can help reduce the risk of dependency and expand the offering into new market segments. Given the geopolitical situation, be flexible with payment terms and logistics.

COMPETITIVE ANALYSIS

An analysis of import flows and competitor online presence reveals a competitive landscape dominated by large Italian and Spanish players, heavily focused on **hair coloring** and large-scale production. This creates a significant opportunity for TRI*****OS to differentiate itself through its unique positioning in hair health and wellness.

Main Competitors Identified

| Competitor | Village | Specialization | Presence in the Target Markets | Positioning |
|------------------|---------|---|--|---------------------------------|
| PET***ON | Italy | Coloring , products professional complete | Ecuador (68.5%), Russia (14.5%), Ukraine (98.6%) | Supplier reliable and versatile |
| OYSTER COSMETICS | Italy | Coloring professional | Mexico (PROSALONS) | "The Colour Professionals" |
| **CTL SpA** | Italy | Products professional | Russia (44.3%) | Market leader in Russia |
| GVFSpA | Italy | Coloring (Itely , Aquarely) | Ecuador (8.1%) | Multiple brands , coloring |
| NIRVEL COSMETICS | Spain | Coloring and treatments | Russia (10.2%) | Spanish brand professional |

Table 7: Main competitors in target markets.

Detailed Analysis: OYSTER COSMETICS

Company Profile :

- ****Name****: Oyster Cosmetics SpA
- **** Headquarters ****: Brescia, Italy
- ****Year of foundation****: 1983 (40+ years of experience)
- ****Tagline****: "THE COLOR PROFESSIONALS"
- ****Website****: www.oystercosmetics.com
- **** Factory ****: 65,000 m2
- **** Distribution ****: 80+ countries
- **** Certifications ****: ISO 9001, ISO 22716 (GMP)

Strategic Positioning :

OYSTER COSMETICS positions itself as a leader in professional hair color, with a strong emphasis on production capacity and technical excellence. Its communication strategy is traditional, focusing on Made in Italy products and manufacturing quality.

Main Focus : Specialization in hair coloring with a complete range of technical products for professional hairdressers.

Approach : Technical-productive, emphasizing large-scale production capacity, R&D laboratories, and international certifications.

Storytelling : Italian tradition of beauty and cosmetics, valorization of manufacturing capacity, technical excellence and production quality.

Business Channels :

5. Professional **: Salon Products professional
6. **Consumer**: Retail lines for domestic use
7. **Private Label**: Production I count third parties

Distinctive Elements :

- **West Garda Academy**: Training center on Lake Garda for hairdressers
- **Global Presence**: Participation in international trade fairs (Cosmoprof Asia, India)
- **Innovation**: 4 specialized laboratories (R&D, Regulatory , Quality, Microbiology)
- **Versatility**: Three business channels to maximize market coverage

Strengths :

- Established brand equity as "The Color Professionals"
- Capacity productive on wide stairs
- Distribution global in 80+ countries
- Certifications international
- Training Center dedicated

Weaknesses :

- Communication traditional , less contemporary
- Limited focus at the coloring
- Little emphasis on sustainability and social responsibility
- Generic storytelling about Made in Italy without strong differentiation

Detailed Analysis: PET***ON COSMETICS (ECHOS LINE)

Company Profile :

- Name: PET***ON Cos***** SpA
- Main brand : ECHOS LINE
- Headquarters : Italy
- Distribution: Global, strong presence in Latin America, Eastern Europe, Russia

Strategic Positioning :

PET**ON COSMETICS, through its ECHOS LINE brand, adopts a similar approach to Oyster, with a wide range of professional products and a focus on versatility and technical performance. The brand is perceived as reliable and comprehensive.

Main Focus : Complete range of professional products for hairdressers, from coloring to treatments, from styling to accessories.

Approach : Technical-professional, emphasizing the completeness of the range and the versatility of the solutions offered.

Presence in Target Markets :

- Ecuador: 68.5% market share at BELHACOSMETICS
- Russia: 14.5% market share at OOO IFB
- Ukraine: 98.6% market share at TOB TIKCAH

Strengths :

- Very wide and complete product range
- Strong consolidated presence in target markets
- Long-term relationships with distributors
- Reliability and consistency qualitative

Weaknesses :

- Positioning generic without strong differentiation
- Communication traditional
- Little emphasis on contemporary trends (wellness, sustainability)

Comparative Analysis: TRI*****OS vs. Competitor

The following table summarises the main differences in positioning between TRI*****OS and its main competitors:

| Size | COMPETITOR | TRI*****OS |
|----------------------------------|---|---|
| Main Focus | Coloring and products technicians | Hair health and well-being |
| Approach | Technical-productive | Scientific-trichological |
| Identity | "The Color Professionals" / Supplier complete | Hair health specialist |
| Storytelling | Italy tradition , production capacity | Innovation , research , sustainability , health |
| Values | Excellence technique , reliability , quality | Sustainability, social responsibility, well-being, innovation |
| Target | Professional B2B + Consumer (Oyster) | Professional B2B |
| Communication | Traditional , technical | Contemporary , scientific yet accessible |
| Differentiation | Excellence in the coloring | Hair structure study, holistic approach |
| Portfolio | Multi-channel mono-brand (Oyster) / Single brand (PET***ON) | Strategic multi-brand (3 brands) |
| Positioning In the market | Product Supplier | Hair health consultant |

CUSTOMER Competitive Advantage

CLIENTE's competitive advantage lies in its **ability to not compete directly** with the hair color giants, but to position itself as a **complementary partner with high added value** . This strategy offers multiple benefits:

Strategic Complementarity

While competitors focus on the technical act of coloring, TRI*****OS takes care of everything that comes before and after:

Before Coloring :

- Hair and scalp preparation
- Pre -coloring treatments to optimize results
- Trichological diagnosis to personalize treatment

During Coloring :

- Protective products to minimize damage
- Formulations that respect the hair structure

After Coloring :

- Treatments repairers and regenerators
- Maintenance of hair health
- Color protection through hair health

Differentiating Scientific Approach

Hair Structure Study : TRI*****OS bases its offerings on an in-depth study of hair structure and the stresses it is subjected to. This scientific approach allows for:

- Communicate with authority and credibility
- Educate hairdressers and end customers
- Justifying premium pricing
- Create fidelity through results tangible

Alignment with Contemporary Trends

TRI*****OS is perfectly aligned with the main consumer trends that are reshaping the beauty market:

Hair Wellness : Increasing attention to hair and scalp health, " skinification of hair " approach, focus on long-term well-being.

Sustainability : Documented environmental commitment (section "TRI*****OS for the environment"), sustainable packaging, eco-friendly formulations.

Social Responsibility : Commitment to the community (section "TRI*****OS for social issues"), ethical values, responsible business.

Clean Beauty : Attention to ingredients, transparency, formulations based on scientific research.

Strategic Multi-Brand Portfolio

TRI*****OS manages three brands with distinct positionings, allowing it to serve different market segments:

| Brand | Positioning | Target | Advantage |
|-------------------------------------|-------------------------------------|---|-------------------------------|
| Selective Professional | Premium, creativity Italian | High-end salons, demanding hairdressers | Margins high , prestige |
| Kezy | Accessible , practical contemporary | Medium salons , clientele wide | Volume, penetration |
| Moroccanoil (distribution) | Prestige international , Argan Oil | clientele , trend-setters | Brand equity, recognisability |

This multi-brand strategy allows you to:

- Maximize market coverage**
- Offering solutions for different budgets and needs
- Reduce the risk of addiction to a single brand
- Facilitate entry to distributors with diversified portfolios

Differentiation Opportunities in Target Markets

Ecuador (BELHACOSMETICS)

Gap Identified : Portfolio saturated with hair color brands (PET***ON 68.5%, GVF 8.1%), lack of brands specialized in hair treatments and well-being.

Differentiation Strategy :

- Positioning itself as a specialist in complementary treatments to hair colouring brands
- Offer integrated pre /post-coloring protocols
- Provide specialized training** on trichology and hair health
- Create added value** for client salons (increase in average ticket price, loyalty)

Mexico (PROSALONS)

Gap Identified : Portfolio with Oyster (coloring), need for complementary brands with sustainability values.

Differentiation Strategy :

- Emphasize value alignment on sustainability (PSGroup uses solar energy)
- Co-create marketing campaigns on shared values
- Propose long-term strategic partnerships
- Leverage a network of 450+ partners for rapid deployment

Russia (OOO IFB)

Gap Identified : Market with strong competition on color, space for differentiated premium brands.

Differentiation Strategy :

- Positioning Selective Professional as an exclusive premium brand
- Emphasize innovation and scientific research
- Communicating Made in Italy as a guarantee of superior quality
- Offer dedicated training support in Russian

Ukraine (TOB TIKCAH)

Gap Identified : Near total dependence on PET***ON (98.6%), concentration risk.

Differentiation Strategy :

- Propose portfolio diversification to reduce risk
- Offer complementary products to the existing PET***ON range
- Positioning ourselves as the second most trusted Italian supplier
- Be flexible on trade terms given the geopolitical situation

TRI*****OS POSITIONING

Corporate Identity and Values

TRI***OS SpA** is an Italian company founded in 1982, specializing in the production of professional cosmetics for hairdressers. With over 40 years of experience, TRI*****OS stands out for its **scientific-trichological approach** focused on hair health and well-being.

Tagline : "Professional products for hairdressers since 1982"

Company Philosophy :

*"All cosmetics formulated and manufactured by TRI*****OS are based on an in-depth study of the hair structure and the stresses to which it is subjected. The primary objectives are to achieve and protect hair health through innovative, quality products."*

This philosophy differentiates TRI*****OS from competitors who focus primarily on coloring or styling, positioning the company as a **specialist in hair health and well-being**.

Core Values :

| Value | Description | Evidence |
|-----------------------|---|--|
| Professionalism | Focus on the B2B market, products for professional hairdressers | 40+ years of experience, consolidated partnerships |
| Innovation | Products based on scientific research and study of the hair structure | Projects funded by the POR FESR Tuscany 2014-2020 |
| Reliability | Consistent quality and Made in Italy as a guarantee | Company history consolidated since 1982 |
| Sustainability | Commitment to reducing environmental impact | Dedicated section "TRI*****OS for the environment" |
| Responsibility Social | Commitment to the community | Dedicated section "TRI*****OS for social issues" |

Brand Portfolio

TRI*****OS operates a strategic multi-brand portfolio with three core brands, each with a distinct positioning:

SELECTIVE PROFESSIONAL

Positioning : Premium brand 100% Made in Italy

Characteristics :

- Expression of Italian creativity, originality and passion
- Focus on hair care and well-being
- Complete range of high-end professional products

Product Range :

- Coloring premium cosmetics
- Healing lines and treatments intensive
- Eco- friendly products
- Solutions for all professional market needs

Target : High-end salons, demanding hairdressers looking for superior quality and excellent results

Values : Italian creativity, quality, innovation, excellence

Competitive Advantage : Premium positioning with high margins, brand prestige, superior perceived quality

KEZY

Positioning : Accessible Italian brand for the contemporary woman

Characteristics :

- 100% Italian, an expression of the passion and taste of the Bel Paese
- Simple and immediate solutions for daily beauty
- Practicality without giving up on self-care
- Contemporary woman looking for practicality and quality

Target : Medium-sized salons, a broad clientele looking for quality at an affordable price

Values : Refinement, simplicity as emotion, accessible professional products

Competitive Advantage : Optimal quality-price ratio, market penetration, sales volume

MOROCCANOIL (Distribution)

Positioning : International premium brand specializing in Argan Oil

Characteristics :

- First brand to market Argan Oil in the professional sector
- Treatment that protects and repairs in depth
- Returns brightness and hydration
- Rich in antioxidants and nutrients

Target : Premium clientele, trend-setters, consumers attentive to natural ingredients

Values : Naturalness, effectiveness, international prestige

Competitive Advantage : International brand equity, recognition, word-of-mouth growth

Note : TRI*****OS is the official distributor of this international brand, adding prestige to the portfolio

Unique Value Proposition

TRI*****OS' value proposition for distributors in target markets is built on three key pillars:

Pillar 1: Complementarity

Message : "We are not in competition with your hair color brands, we are the perfect partner to complement your offering."

Benefits for the Distributor :

- Portfolio expansion without cannibalization
- Cross-selling and up-selling opportunities
- Increase in average value per customer
- Differentiation from the competition

Benefits for Salon Clients :

- Complete offer for the end customer
- Protocols pre/post coloring integrated
- Increase in the average ticket per service
- Loyalty clients through results superiors

Pillar 2: Added Value

Message : "We don't just sell products, we offer knowledge, training, and support to help your business grow."

Services Offered :

- Specialized training on trichology and hair health
- Marketing and communication materials
- Support technician dedicated
- Treatment protocols personalized

Benefits :

- Raising the skills of hairdressing clients
- Building loyalty through support
- Distributor differentiation in the local market

Pillar 3: Shared Values

Message : "We share your values of sustainability, quality, and social responsibility."

Alignment Elements :

- I commit environmental documented
- Responsibility social towards the community
- Focus on health and well-being

- Approach ethical to business

Benefits :

- Partnership based on values municipalities
- Co-marketing on sustainability topics
- Appeal to consumers sensitive to ESG issues

MARKET TRENDS AND FORECASTS (2025-2030)

Global Market Size and Growth

The global beauty market is experiencing moderate but sustained growth, with the haircare sector maintaining a prominent position. Forecasts indicate significant opportunities, especially in the professional segment and emerging markets.

Global Beauty Market :

- Expected value 2030: \$590 billion (core segments: skin care, cosmetics, hair care, fragrance)
- CAGR 2025-2030: 5% (slowing from 7% in 2022-2024)
- The period 2022-2024 benefited from inflationary growth and strong volume growth

Global Haircare Market :

- 2024 Value: \$106.91 billion
- Projected value 2025: \$113.93 billion
- Projected value 2032: \$213.47 billion
- CAGR: 3.2-6.4% (varies by source)

Professional Haircare Market (focus TRI***OS):**

- 2024 Value: \$20.4 billion
- Projected value 2033: \$57.5 billion
- CAGR: 5.3-5.96%
- Growth driven by emerging markets and the premium segment

Source: McKinsey "State of Fashion: Beauty 2025", Allied Market Research*

| Segment | Value 2024 | Projected Value 2030-2033 | CAGR |
|-----------------------|------------|---------------------------|-----------|
| Global Beauty (core) | ~\$400B | \$590B (2030) | 5.0% |
| Global Haircare | \$106.9B | \$213.5B (2032) | 3.2-6.4% |
| Professional Haircare | \$20.4B | \$57.5B (2033) | 5.3-5.96% |

Macroeconomic and Geopolitical Factors

Inflation and Cost Pressure

Current Situation :

- Years of inflation have eroded consumers' purchasing power
- Increase costs energy (+27% in 2022)
- Increase in raw material and logistics costs
- Margin pressure for manufacturers and distributors

Market Impact :

- Consumers more attentive to value rather than price
- Growth in the mass and masstige segment (+5 percentage points in 5 years)
- 50% of consumers combine premium and mass market brands
- Need to clearly communicate differentiated value

Implications for TRI***OS :** Emphasize the added value of products (hair health, long-lasting results, damage reduction) to justify premium pricing. In the professional segment, quality remains the primary driver.

US Tariffs and Trade Barriers

Current Situation (2025) :

- Rates average on beauty products : 25.8% (Tax Foundation 2025)
- Tenfold increase in prices on beauty products
- Aluminum tariff: 50% (impact on packaging)
- Two-thirds of production costs come from imports

Impact on Industry :

- Significant increase in production costs for US exports
- Disruption of consolidated supply chains
- Need for sourcing reorganization
- Pressure on prices finals

Implications for TRI***OS :** Prioritize markets with favorable trade agreements (Latin America, Eastern Europe, Asia). Diversify geographically to reduce dependence on the US market.

Geopolitical Tensions

Current Situation :

- Russia-Ukraine War: Supply Chain Disruption, Rising Energy Costs
- US-China Tensions: Impact on Sourcing and Distribution
- Middle East Instability: Volatility in Oil Prices and Logistics

Impact on the Sector :

- Uncertainty in the planning strategic
- Need for diversification geographic suppliers
- Increase costs logistics and insurance
- Volatility changes currency

Implications for TRI***OS :** Be flexible on trade terms, especially for impacted markets (Russia, Ukraine). Consider nearshoring and supply chain diversification.

Medium-Long Term Forecast (12-24 Months)

Base Scenario

Moderate but Sustained Growth :

- CAGR 3-5% for global haircare
- CAGR 5-6% for professional haircare
- Growth driven by emerging markets, premium segment, innovation, e-commerce

Persistent Pressures :

- Inflation moderate but persistent
- Energy and logistics costs elevated
- Supply chain complexity
- Competition intensified

Competitive Dynamics

Consolidation :

- M&A in the sector for economies of scale
- Big players strengthen positions
- Independent brands under pressure

Differentiation :

- Need for positioning clear
- Niches specialized they offer opportunity
- Storytelling and crucial brand values
- Innovation as a factor key

Implications for TRI*****OS

Opportunity :

1. Hair wellness positioning aligned with trends
2. Differentiation vs. coloration creates competitive space

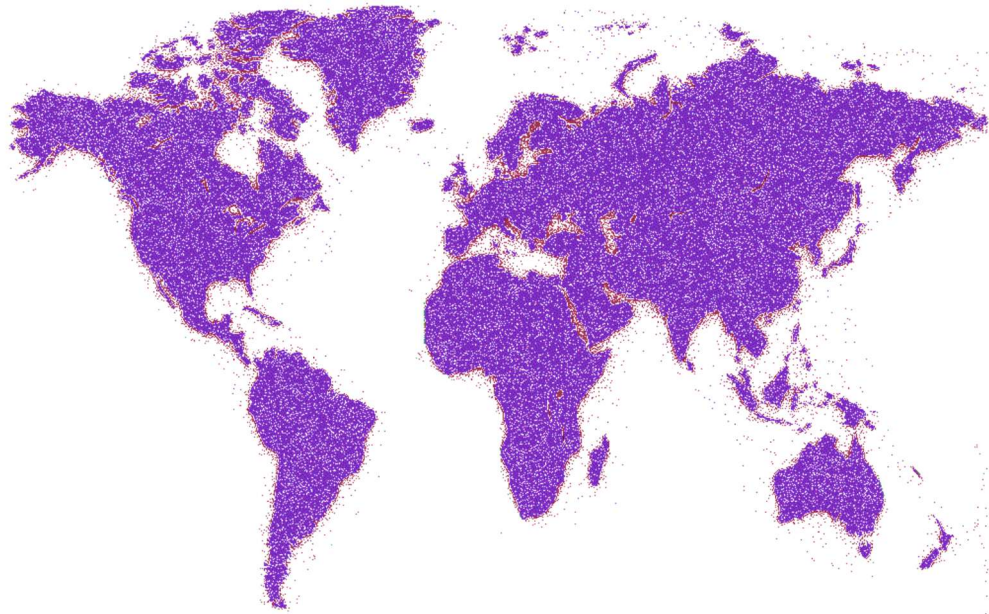
3. Markets emerging with strong potential
4. Sustainability as a value differentiating
5. Segment professional more resilient

Challenges :

1. US tariffs impact North American exports
2. Competition intensified requires marketing investments
3. Pressure inflation margins costs
4. Supply chain complexity and logistics costs
5. Need for multi-channel presence (online + offline)

Datasets analyzed

- TRI*****OS Export Flow
- Import Flow TOB TIKCAH-(Ukraine)
- Import Flow OOO IFB -(Russian Fed.)
- Import Flow PRO SALON SA DE CV-(Mexico)
- Import Flow IMPORTADORA BELHACOSMETIC SA-[Ecuador]



This report is an advanced analysis and strategic support tool, based on datasets extracted from customs declarations, transport documents (Bill of Lading) and other information from commercial databases and public sources and proprietary Ztor models.

The information contained herein is prepared with the utmost accuracy and is intended to provide a structured view of markets, competitors, and development opportunities. However, this document does not constitute a certified appraisal or legal, tax, or accounting advice.

Any operational decisions should also incorporate specific assessments where necessary.

Period analyzed: 2018–2025

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