

Beauty and Personal Care in Saudi Arabia

April 2024

Table of Contents

Beauty and Personal Care in Saudi Arabia

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising health and hygiene concerns support demand for baby and child-specific products

Johnson's & Johnson continues to lead but faces growing competition

Pharmacies continue to lead distribution

PROSPECTS AND OPPORTUNITIES

Category sales set to see healthy growth with an increasing focus on natural and sustainable options

Retail e-commerce likely to gain a stronger foothold in the market

Declining birth rate poses a potential obstacle to stronger growth

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increased focus on personal health and hygiene supports demand
Lux continues to lead while Always launches new intimate hygiene range
Pharmacies dominate the distribution of bath and shower

PROSPECTS AND OPPORTUNITIES

Sales set to stagnate while manufacturers are expected to focus on natural and sustainable products
Beauty specialists expanding but pharmacies set to remain on top
E-commerce continues to grow

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Female empowerment and investment in fashion and beauty boosting sales of colour cosmetics
Brands target younger consumers as demand continues to grow
Local brand Asteri Beauty launched in 2023 while Sheglam opens first offline store

PROSPECTS AND OPPORTUNITIES

Sales expected to benefit from female empowerment and an increase in tourism
New technology could help women make new and bolder decisions in the make-up they choose to wear
E-commerce still has room for development while BNPL services should encourage spending

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Active lives and an increased focus on health and hygiene informs demand for deodorants in 2023
Nivea maintains its leading position thanks to ongoing investment in marketing and new product development
Supermarkets and hypermarkets continue to lead the distribution of deodorants

PROSPECTS AND OPPORTUNITIES

Sustainability, natural ingredients and dermocosmetics: Three trends to look out for over the forecast period
Positive signs for deodorants
E-commerce continues to grow as consumers become more savvy shoppers

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales struggle as many women opt for laser hair removal
Gillette Venus extends its portfolio and focuses on educating women on the benefits of shaving
Veet continues to dominate depilatories

PROSPECTS AND OPPORTUNITIES

Depilatories set for challenging future as competition from alternative hair removal products and services grows
Distribution set to expand with a growing focus on e-commerce
Government initiatives could benefit sales

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Arabian Oud continues to lead
Beauty specialists continue to dominate distribution while entrepreneurs experiment with a modern take on traditional fragrances
Increase in tourism provides a boost to sales

PROSPECTS AND OPPORTUNITIES

Bright outlook for fragrances backed by economic growth and an increase in tourism
E-commerce continues to grow while BNPL services open up new opportunities for premium fragrances

Increase in tourism set to boost sales of fragrances.

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 Saudi Arabia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hair care thriving as consumers focus more on their appearance

Pantene continues to lead but faces mounting competition as new products continue to hit the market

Hair salons and beauty specialists making headway in the distribution of hair care

PROSPECTS AND OPPORTUNITIES

Consumers expected to focus on more natural and sustainable hair care solutions over the forecast period

Health and hygiene should boost demand as players focus on digital sales and marketing

More stable outlook for hair care

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 Saudi Arabia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men's grooming receiving growing interest but increasing competition for men's shaving undermines category growth

Gillette continues to lead men's grooming while Nivea faces growing competition in men's skin care

Health and beauty specialists lead distribution in men's grooming

PROSPECTS AND OPPORTUNITIES

Strong potential of men's grooming likely to encourage innovation and new product development

Economic growth and more tourists set to boost sales – especially of men's fragrances

E-commerce set to gain share in men's grooming over the forecast period

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sensodyne continues to lead oral care

Sensodyne leads but competition intensifies with ongoing investment in innovation and new product development

Supermarkets, hypermarkets and pharmacies continue to lead the distribution of oral care

PROSPECTS AND OPPORTUNITIES

Increasing oral health awareness expected to boost sales

Natural, clean and green concepts to continue expanding, while electric toothbrushes become increasingly advanced

E-commerce set to make further inroads in oral care as consumers embrace the convenience of online shopping

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Skin care sales on the rise in 2023 as players target younger consumers

Garnier introduces new acne skin care range while the range of dermocosmetics continues to grow

K-Beauty continues to have a growing influence but Nivea remains the leading brand

PROSPECTS AND OPPORTUNITIES

Natural and dermocosmetics continues to expand

Natural and sustainable products set to make headway over the forecast period

Beauty specialists set to thrive while e-commerce should see further gains

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Increased awareness of the threat posed by sun exposure continues to support demand for sun care in 2023
- La Roche Posay leads sun care
- Pharmacies continue leading distribution channels

PROSPECTS AND OPPORTUNITIES

- New product developments expected
- New product development expected to focus on natural and sustainable ingredients and materials and dermocosmetics
- E-commerce set to win further share as more consumers shop online

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Domestic and inbound tourism playing a key role in the growth of premium beauty and personal care
- Arabian Oud continues to lead with premium fragrances remaining the key category
- Small entrepreneurs target younger adults while clean, sustainable and cruelty-free products make headway

PROSPECTS AND OPPORTUNITIES

- IPOs, mergers and acquisitions and a cleaner and more ethical approach to beauty and personal care
- E-commerce continues to grow
- Vision 2030 paints a bright picture for premium beauty and personal care

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 Saudi Arabia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mass beauty and personal care enjoys healthy growth as Saudi Arabia encourages new visitors and the pandemic comes to an end

Sheglam opens its first physical outlet in Saudi Arabia

Beauty specialists on the rise in Saudi Arabia as they develop an omnichannel approach to retailing

PROSPECTS AND OPPORTUNITIES

Sustainability and health and wellness expected to inform sales growth

E-commerce set to play a more prominent role in the future

Increased focus on personal health and hygiene should support demand

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-saudi-arabia/report.