

Beauty and Personal Care in Belgium

April 2024

Table of Contents

Beauty and Personal Care in Belgium

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price inflation supports value sales growth

Consumption stifled by switch to family packs

Dermocosmetics brands gain appeal among affluent groups

PROSPECTS AND OPPORTUNITIES

Baby and child-specific products to face ongoing constraints

Baby and child-specific sun care to remain dynamic thanks to hot weather and consumer awareness

Opportunity for mass dermocosmetic brands to develop

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
- $\textbf{Table 16 LBN Brand Shares of Baby and Child-specific Skin Care: } \% \ Value \ 2020-2023$
- 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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation curbs consumption of bath and shower products
Skin benefits and fragrances remain important to shoppers

Discounters improve position in bath and shower

PROSPECTS AND OPPORTUNITIES

Demand to pick up as the forecast period progresses

Premiumisation trend to bounce back

Sustainability to become more relevant as cost of living concerns subside

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers reduce demand for colour cosmetics as cost of living rises

Mass brands gain appeal as affordability is high on the consumer agenda

Product pipeline continues in colour cosmetics

PROSPECTS AND OPPORTUNITIES

Positive outlook for colour cosmetics

Consumers seek out cosmetics with skin care benefits

Young consumer base to drive sales of mass colour cosmetics

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for deodorants remains dynamic

Sprays, sticks and roll-ons outperform other products

Ongoing innovation in deodorant category provides stimulus for growth

PROSPECTS AND OPPORTUNITIES

Slight growth anticipated in volume sales of deodorants

Development of premium deodorant creams

Innovation to remain key over the forecast period.

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for depilatories remains resilient

Home spa trend drives new developments in hair removal devices

Competition from pre-impregnated razors and blades accelerates decline for pre-shave products

PROSPECTS AND OPPORTUNITIES

Demand for premium and reuseable razors expected to rise

Competition from beauty salons set to rise

Popularity of laser hair removal to impact depilatories

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising price of fragrances leads to reduction in volume sales

Innovation prevails in women's premium fragrances

EU Omnibus Directive creates negative impact on premium fragrances

PROSPECTS AND OPPORTUNITIES

Expenditure on beauty products to recover in upcoming period

Premium unisex fragrances to enjoy stronger growth

Hair fragrances offers growth opportunities

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hair care volume sales decline in 2023

Consumers seek clean hair care products with sustainable positioning

Strong product innovation in hair care

PROSPECTS AND OPPORTUNITIES

Price stabilisation to push demand for hair care

Clean beauty and the natural look to drive consumers towards premium shampoos and conditioners

Sustainability to drive innovation in forthcoming period

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men's shaving dampens overall sales performance in men's grooming

Long beard trend also creates sales opportunities within men's shaving

Mass products outpace premium in men's toiletries

PROSPECTS AND OPPORTUNITIES

Price stabilisation and growth of premium products to drive sales in men's grooming

More sophisticated products to form part of men's grooming routines

Long beard trend creates new sales opportunities

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Oral care faces constraints as volume sales decline

Oral hygiene awareness and wider retail availability boosts sales of niche products

Brands positioned for therapeutic use gain share

PROSPECTS AND OPPORTUNITIES

Price stabilisation to boost demand for oral care

Therapeutic products to keep gaining share

Mouthwashes and dental floss to witness rapid 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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Polarised demand patterns are visible in skin care

Issue-specific skin care products gain appeal

Further development of mass dermocosmetics brands

PROSPECTS AND OPPORTUNITIES

Muted performance with slight growth in the latter stages of the forecast period

Mass dermocosmetic brands face strong growth prospects

Natural-look trend to drive sales of skin care over the forecast period

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sun care volume sales decline in 2023

Consumers seek products with additional skin care properties

Natural beauty trend drives sun care sales

PROSPECTS AND OPPORTUNITIES

Sun care to score positively over the forecast period

Premium dermocosmetics brands to gain share

Awareness concerning sun exposure to boost volume sales

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumption falls for higher-priced premium products

Dermocosmetics provide a growth area in the premium segment

The new EU Omnibus Directive creates negative impact on premium beauty and personal care products

PROSPECTS AND OPPORTUNITIES

Premium beauty and personal care products to experience strong performance

Dermocosmetic brands to gain larger share in premium segment

Positive developments in colour cosmetics

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 Belgium

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mass beauty and personal care products to outperform premium alternatives in volume sales

Private label makes inroads in some categories

Mass dermocosmetics grows from a small base

PROSPECTS AND OPPORTUNITIES

Increasing competition from premium products

Mass dermocosmetic brands to see further development

Demand from young consumer base to drive sales in mass segment

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 focusing 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-belgium/report.