

# Beauty and Personal Care in the Philippines

April 2024

Table of Contents

## Beauty and Personal Care in the Philippines

### 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Declining birth rate has negative impact on sales, although baby and child-specific skincare products see robust growth

Income disparity influences demand with products and packaging tailored to meet different audiences

Competitive landscape remains relatively consolidated due to faith placed in trusted brands

#### PROSPECTS AND OPPORTUNITIES

Baby and child-specific products has potential to expand, alongside rising disposable incomes

Established local apparel brands could provide an additional avenue for companies to market their products

Oral care offers growth opportunities for baby and child-specific products

### 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 the Philippines

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Opportunities remain in bath and shower, despite normalisation of hygiene behaviours post-pandemic  
Bar soap continues to dominate sales, thanks to its affordability and wide range of products, while smaller brands attract greater attention  
Intimate washes benefit from a spate of new, local entrants.

### PROSPECTS AND OPPORTUNITIES

Bath and shower offers significant scope for growth, with skin whitening claims continuing as a key driver of sales  
Body wash/shower gel will see further development, but players will need to take account of local preferences  
Continued shift towards e-commerce

### 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 the Philippines

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Colour cosmetics sees dynamic performance alongside return of busy lifestyles  
Lip and cheek tints are valued for their versatility and long-lasting properties  
Competition intensifies, as local brands raise their profile

### PROSPECTS AND OPPORTUNITIES

Premium brands are expected to look to expand their presence, alongside rising disposable incomes  
E-commerce will play a key role in generating demand, but bricks-and-mortar stores will remain important  
Home-grown brands will gain a stronger foothold in the market by tailoring their products to the needs of local consumers

### 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 the Philippines

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Deodorants thrive as consumers return to active lifestyles, with focus on fragrance mists and offerings with skin whitening properties  
Consumers look to avoid aluminium-based products  
Local and international brands vie for share

## PROSPECTS AND OPPORTUNITIES

Product development will drive growth, as brands focus on an ingredient-led positioning  
Deodorant sprays offer scope for premium brands, while deodorant wipes are poised to gain more attention  
E-commerce set to win further share

## 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Depilatories represents a highly diverse market, with consumers open to a range of hair removing methods, with eyebrow razors growing in popularity  
Access to a range of professional treatments presents a significant obstacle to growth  
Gillette remains the go to option in women's razors and blades

## PROSPECTS AND OPPORTUNITIES

Depilatories set for further growth but "natural" DIY options likely to limit the potential of the category  
Beauty salons will present competition to depilatories, although demand from home-based businesses could boost retail sales  
E-commerce offers opportunities for brands to expand their reach

## 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Buoyant demand for fragrances, alongside resumption of social activities and increase in marketing efforts  
Influx of new arrivals across all price segments  
Distribution landscape in a state of flux as players seek out new opportunities in e-commerce

## PROSPECTS AND OPPORTUNITIES

Economic growth should boost demand while e-commerce retailers work on building trust in the authenticity of their products  
E-commerce will offer further opportunities for players, although physical stores will continue to play an important role

Eau de parfum will remain a popular option due to its perceived ability to withstand humidity

## 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Salon professional products help add value to a mature category

Return to busy, social lifestyles boost demand for colourants, while conditioners and treatments see stagnant performance, despite new entrants

Multinationals maintain dominance, but local brands attract considerable interest, with social media playing an important role

### PROSPECTS AND OPPORTUNITIES

Premiumisation could help deliver value growth as hair care suffers from maturity

Toning shampoos and styling agents have room to grow thanks to new and developing trends

Scalp serums with a medical positioning will gain significant traction among consumers

## 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Men's grooming continues to thrive, with a knowledgeable local consumer base helping to drive demand

Men's grooming market continues to be impacted by general beauty and personal care trends

Private label sees growing interest but Unilever and Procter & Gamble maintain dominance

### PROSPECTS AND OPPORTUNITIES

Positive outlook for men's grooming with further segmentation in terms of benefits

New business opportunities should benefit sales of men's shaving and skin care

Multinationals likely to retain their lead but e-commerce will open the door to smaller brands with more unique offerings

## 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Celebrity-driven culture underpins quest to achieve the perfect smile

Health and wellness trend fuels demand for mouthwashes/dental rinses

Oral care sees an increasing focus on natural and sustainable ingredients and products

### PROSPECTS AND OPPORTUNITIES

Oral care set to grow and expand as consumers develop more sophisticated routines

Dental products that can be used on infants offer scope for growth

Breath strips/mouth fresheners could prove to be popular

## 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Ingredient-led beauty remains popular, but some consumers are following less complex skin care regimes

Celebrity endorsements remain a valuable marketing tool

Sustainability concerns come to the fore, although counterfeit products remain a concern

### PROSPECTS AND OPPORTUNITIES

The Philippines is likely to remain a popular testing ground for new products

Premium and affordable skin care products are both set to thrive, as consumers mix and match

Growing interest in organic products

## 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sun care continues to shine, thanks to growing levels of health awareness and wide availability of products at accessible price points

Launch of more sophisticated products in sun protection, while self-tanning remains unpopular

Natural, plant-based ingredients provide inspiration

### PROSPECTS AND OPPORTUNITIES

Consumers likely to be willing to pay more for better results when it comes to sun care

Skin care and colour cosmetics with sun protection benefits could cannibalise sales

Local and regional brands will present a threat to international players, while parallel imports will continue to pose a challenge

## 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Continued growth for premium beauty and personal care as consumers follow the influence of celebrities

Dermocosmetics and ingredient-led beauty drive interest in premium products

Competitive landscape remains highly fragmented with e-commerce becoming increasingly important

### PROSPECTS AND OPPORTUNITIES

Growing thirst for luxury products, with social media influencers playing a key role

Retail e-commerce set to thrive thanks to competitive pricing and expanding product offer

Consumers will pay more for better results due to growing focus on skin health

## 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 the Philippines

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Healthy growth in 2023, with mass colour cosmetics, fragrances and deodorants benefiting from return of busy, pre-pandemic lifestyles

Multinationals lead sales but local brands make strides

Skin lightening products and dermocosmetics retain a strong presence

#### PROSPECTS AND OPPORTUNITIES

Filipinos will become more open to trying new products, alongside rising levels of purchasing power, with local brands expected to gain traction

Mass sun care has further potential as consumers become more aware of the dangers of sun exposure, while high number of denture wearers offers scope for gargles/mouth rinses

Men's grooming will offer new opportunities for brands to expand their presence in the market

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