Beauty and Personal Care in Saudi Arabia

May 2023

Table of Contents
Beauty and Personal Care in Saudi Arabia

EXECUTIVE SUMMARY

Beauty and personal care in 2022: The big picture
2022 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 2017-2022
Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2019-2022
Table 6 - Distribution of Beauty and Personal Care by Format: % Value 2017-2022
Table 7 - Distribution of Beauty and Personal Care by Format and Category: % Value 2022
Table 8 - Forecast Sales of Beauty and Personal Care by Category: Value 2022-2027
Table 9 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Saudi Arabia

KEY DATA FINDINGS

2022 DEVELOPMENTS

The end of remote learning provides a boost for sales
Johnson’s maintains its leading position
Pigeon launches Natural Botanical Baby Range

PROSPECTS AND OPPORTUNITIES

Natural and sensitive products likely to win over parents
Pharmacies to continue leading distribution channels
Declining birth rate poses a potential obstacle to stronger growth

CATEGORY DATA

Table 10 - Sales of Baby and Child-specific Products by Category: Value 2017-2022
Table 11 - Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
Table 12 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
Table 13 - NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
Table 14 - LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
Table 15 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022
Table 16 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
Table 17 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
Table 18 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 20 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in Saudi Arabia

KEY DATA FINDINGS
2022 DEVELOPMENTS
New product developments continue to drive interest and sales
The use of hand sanitisers declines as COVID-19 fears subside
E-commerce continues to grow

PROSPECTS AND OPPORTUNITIES
Natural and dermocosmetics present growth opportunities but overall demand is unlikely to increase significantly
Pharmacies likely to remain the key distribution channel but competition from other channels is growing
Increased focus on personal health and hygiene should help to sustain demand

CATEGORY DATA
Table 21 - Sales of Bath and Shower by Category: Value 2017-2022
Table 22 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 23 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 24 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 25 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 26 - LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
Table 27 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 28 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 29 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in Saudi Arabia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Colour cosmetics continues its recovery as Saudi Arabia promotes female empowerment
Make Up For Ever continues to lead
Hermès opens its first perfume and cosmetics store as distribution landscape expands

PROSPECTS AND OPPORTUNITIES
Governmental initiatives supports growth
Augmented Reality (AR) and make-up artists could help drive sales of colour cosmetics
Buy Now Pay Later services expected to help support spending

CATEGORY DATA
Table 30 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 31 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 32 - NBO Company Shares of Colour Cosmetics: % Value 2018-2022
Table 33 - LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
Table 34 - LBN Brand Shares of Eye Make-up: % Value 2019-2022
Table 35 - LBN Brand Shares of Facial Make-up: % Value 2019-2022
Table 36 - LBN Brand Shares of Lip Products: % Value 2019-2022
Table 37 - LBN Brand Shares of Nail Products: % Value 2019-2022
Table 38 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
Table 39 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 40 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

Deodorants in Saudi Arabia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Demand for deodorants grows while players respond to demands for products free from alcohol and aluminium
Nivea continues to lead with ongoing investment in new product development
E-commerce continues to grow as online shopping becomes increasingly convenient

PROSPECTS AND OPPORTUNITIES
Governmental initiatives supports growth
Sustainability coming into focus as pressures mount to be greener
Consumers want to smell good but not at the expense of their health

CATEGORY DATA
Table 41 - Sales of Deodorants by Category: Value 2017-2022
Table 42 - Sales of Deodorants by Category: % Value Growth 2017-2022
Table 43 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
Table 44 - NBO Company Shares of Deodorants: % Value 2018-2022
Table 45 - LBN Brand Shares of Deodorants: % Value 2019-2022
Table 46 - LBN Brand Shares of Premium Deodorants: % Value 2019-2022
Table 47 - Forecast Sales of Deodorants by Category: Value 2022-2027
Table 48 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
Table 49 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

Depilatories in Saudi Arabia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Depilatories returns to growth despite the lifting of restrictions on professional services
Veet continues to lead
E-commerce showing strong growth potential

PROSPECTS AND OPPORTUNITIES
Depilatories expected to continue facing strong competition from alternative hair removal methods
Governmental initiatives supports growth
Pharmacies will likely remain the leading distribution channel but e-commerce and modern grocery retailers set to win share

CATEGORY DATA
Table 50 - Sales of Depilatories by Category: Value 2017-2022
Table 51 - Sales of Depilatories by Category: % Value Growth 2017-2022
Table 52 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2018-2022
Table 53 - NBO Company Shares of Depilatories: % Value 2018-2022
Table 54 - LBN Brand Shares of Depilatories: % Value 2019-2022
Table 55 - Forecast Sales of Depilatories by Category: Value 2022-2027
Table 56 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

Fragrances in Saudi Arabia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Sales benefit from strong cultural significance of fragrances
Increase in tourism provides a big boost to sales
Arabian Oud continues to lead
Hermès opens its first perfume and cosmetics store while other brands look to promote female empowerment

PROSPECTS AND OPPORTUNITIES
Promotion of tourism and female empowerment should continue to support growth
Buy Now Pay Later (BNPL) services could improve access to fragrances
Competition likely to intensify as demand recovers

**CATEGORY DATA**

<table>
<thead>
<tr>
<th>Table 57</th>
<th>Sales of Fragrances by Category: Value 2017-2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table 58</td>
<td>Sales of Fragrances by Category: % Value Growth 2017-2022</td>
</tr>
<tr>
<td>Table 59</td>
<td>NBO Company Shares of Fragrances: % Value 2018-2022</td>
</tr>
<tr>
<td>Table 60</td>
<td>LBN Brand Shares of Fragrances: % Value 2019-2022</td>
</tr>
<tr>
<td>Table 61</td>
<td>LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022</td>
</tr>
<tr>
<td>Table 62</td>
<td>LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022</td>
</tr>
<tr>
<td>Table 63</td>
<td>Forecast Sales of Fragrances by Category: Value 2022-2027</td>
</tr>
<tr>
<td>Table 64</td>
<td>Forecast Sales of Fragrances by Category: % Value Growth 2022-2027</td>
</tr>
</tbody>
</table>

**Hair Care in Saudi Arabia**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Hair care sees strong growth with consumers keen to invest in their appearance
New launches continue to appear in the category
Hair care sees growing demand for more natural product formulations

**PROSPECTS AND OPPORTUNITIES**

Governmental initiatives supports growth
Natural and dermocosmetics to expand
Consumers expected to show increasing willingness to invest in their appearance

**CATEGORY DATA**

<table>
<thead>
<tr>
<th>Table 65</th>
<th>Sales of Hair Care by Category: Value 2017-2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table 66</td>
<td>Sales of Hair Care by Category: % Value Growth 2017-2022</td>
</tr>
<tr>
<td>Table 67</td>
<td>Sales of Hair Care by Premium vs Mass: % Value 2017-2022</td>
</tr>
<tr>
<td>Table 68</td>
<td>NBO Company Shares of Hair Care: % Value 2018-2022</td>
</tr>
<tr>
<td>Table 69</td>
<td>NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022</td>
</tr>
<tr>
<td>Table 70</td>
<td>LBN Brand Shares of Hair Care: % Value 2019-2022</td>
</tr>
<tr>
<td>Table 71</td>
<td>LBN Brand Shares of Colourants: % Value 2019-2022</td>
</tr>
<tr>
<td>Table 72</td>
<td>LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022</td>
</tr>
<tr>
<td>Table 73</td>
<td>LBN Brand Shares of Styling Agents: % Value 2019-2022</td>
</tr>
<tr>
<td>Table 74</td>
<td>LBN Brand Shares of Premium Hair Care: % Value 2019-2022</td>
</tr>
<tr>
<td>Table 75</td>
<td>Forecast Sales of Hair Care by Category: Value 2022-2027</td>
</tr>
<tr>
<td>Table 76</td>
<td>Forecast Sales of Hair Care by Category: % Value Growth 2022-2027</td>
</tr>
<tr>
<td>Table 77</td>
<td>Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027</td>
</tr>
</tbody>
</table>

**Men's Grooming in Saudi Arabia**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Men show willingness to invest in their appearance
Competition remains strong both from within men's grooming but also from complimentary products
E-commerce thriving but store-based retailers see a recovery as footfall increases

**PROSPECTS AND OPPORTUNITIES**

Governmental initiatives supports growth
Men focusing on improving their health and hygiene
Retail e-commerce expected to take further share from store-based retailers as consumers look for greater convenience
KEY DATA FINDINGS

2022 DEVELOPMENTS
Increased hygiene awareness fuelling demand for oral care
New product development focuses on whitening and natural claims
Sensodyne continues to lead with ongoing investment in new product development

PROSPECTS AND OPPORTUNITIES
Governmental initiatives supports growth
Natural, clean and green concepts to continue expanding
E-commerce set make further inroads as consumers increasingly attracted to the convenience of shopping online

KEY DATA FINDINGS

2022 DEVELOPMENTS
Clean continues to grow with a greater focus towards holistic health and selfcare
Skin care benefits from a large number of new product launches in 2022
E-commerce continues to grow

PROSPECTS AND OPPORTUNITIES
Governmental initiatives supports growth
Sustainability likely to form an important part of the future strategies of many skin care brands
Buy Now Pay Later (BNPL) services expected to thrive while e-commerce stands to win further share
KEY DATA FINDINGS

2022 DEVELOPMENTS

Saudi Arabia’s more liberal policies and an increase in tourism helping to increase demand for sun care
Wide variety of products available in the market through key players. L’Oréal enters sun care
E-commerce continues to grow but still lacks a strong presence in sun care

PROSPECTS AND OPPORTUNITIES

Governmental tourism initiatives should support growth
Sustainability and reef-safe formulas likely to gain more attention as consumers become more eco conscious
The rise of dermocosmetics likely to provide challenges and opportunities for producers of sun care

CATEGORY DATA

Table 111 - Sales of Sun Care by Category: Value 2017-2022
Table 112 - Sales of Sun Care by Category: % Value Growth 2017-2022
Table 113 - NBO Company Shares of Sun Care: % Value 2018-2022
Table 114 - LBN Brand Shares of Sun Care: % Value 2019-2022
Table 115 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022
Table 116 - Forecast Sales of Sun Care by Category: Value 2022-2027
Table 117 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

Premium Beauty and Personal Care in Saudi Arabia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Focus on entertainment and tourism supporting growth
Brands launch campaigns supporting Saudi women empowerment
New developments bring interest and excitement to the category while ‘clean’ products continue to gain favour

PROSPECTS AND OPPORTUNITIES

Government initiatives expected to drive growth
Sustainability is likely to gain traction alongside growing demand for clean products
BNPL and retail e-commerce set to support demand for premium products

CATEGORY DATA

Table 118 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022
Table 119 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 120 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
Mass Beauty and Personal Care in Saudi Arabia

KEY DATA FINDINGS

2022 DEVELOPMENTS
Entertainment and Tourism supports growth
Global brands continue to dominate thanks in part to ongoing investment in new product development
Mass brands focus on new product development to capture consumer attention

PROSPECTS AND OPPORTUNITIES
Governmental initiatives set to have a mixed impact on growth
Sustainability set to be a key focus
Retail e-commerce still seen to have significant room for growth

CATEGORY DATA

Table 124 - Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
Table 125 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 126 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
Table 127 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
Table 128 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2022-2027

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.