



# Beauty and Personal Care in the United Arab Emirates

May 2024

Table of Contents

## Beauty and Personal Care in the United Arab Emirates

### 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 United Arab Emirates

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Parents favour gentle products for their babies and children

Stronger opportunity for private label to make gains

Demographic nuances pose forecasting challenges

#### PROSPECTS AND OPPORTUNITIES

Generation Alpha's love for beauty could be major influence over forecast period

Category expected to see greater premiumisation

Wider selection of products expected on shelves

### 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 United Arab Emirates

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Bath and shower benefits from gifting among local consumers  
Ongoing preference for liquid soap due to convenience and hygiene trends  
Niche brands continue to perform well in 2023

### PROSPECTS AND OPPORTUNITIES

Eco-friendly packaging to gain further traction in bath and shower  
Intimate hygiene a potential source of growth  
Sales of hand sanitisers set to further decline over forecast period

### 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 United Arab Emirates

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Multifunctionality gains traction in colour cosmetics  
Shein offers colour cosmetics under the Sheglam line  
Halal nail polish gaining popularity in local market

### PROSPECTS AND OPPORTUNITIES

Growth of colour cosmetics to remain robust over forecast period  
Beauty players target younger consumers for new growth avenues  
Layering trend to favour lip products

### 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 United Arab Emirates

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Focus on hygiene helps drive demand for deodorants in 2023  
Sustainability offers innovation opportunities for deodorants  
Plant-based formulations to attract eco-conscious consumers

#### PROSPECTS AND OPPORTUNITIES

“Skinification” can drive future growth  
Spray format to remain strongest performer over forecast period  
Local consumers increasingly demand both natural options and efficacy

#### 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 United Arab Emirates

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Focus on soothing sensitive skin  
Disposable razors begin to go “green” through use of sustainable materials  
Veet remains most popular brand in the category

#### PROSPECTS AND OPPORTUNITIES

Permanent hair removal poses a threat to depilatories  
Chemical concerns threaten future growth

#### 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 United Arab Emirates

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Fragrance is a major part of local culture  
Arabian fragrances innovate with ingredients  
Fragrance mists are gaining popularity

#### PROSPECTS AND OPPORTUNITIES

Appeal of unisex formats to continue growing in local market  
Ramadan oud gift boxes popular for gifting  
Fragrance layering trend

## 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 United Arab Emirates

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Brand collaborations on the rise in hair care

Salon professional hair care grows through increasing distribution

Personalisation taps into sustainability and inclusivity

### PROSPECTS AND OPPORTUNITIES

Demand for sustainable packaging to further grow

Unique hair, unique needs

Women's empowerment: Sisterhood and Sunsilk

## 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 United Arab Emirates

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Luxury is driving growth of men's grooming in the local market

Men's skin care benefits from self-help routines

Deodorants as alternative source of fragrance

### PROSPECTS AND OPPORTUNITIES

Growth to remain modest over forecast period

An uptick of men's spas likely to support future demand

Unisex deodorants small but growing segment

## 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 United Arab Emirates

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Product development in toothpaste
- Wellness trends continue to influence oral care
- Power toothbrushes perform well during holiday season

#### PROSPECTS AND OPPORTUNITIES

- Replacement heads vulnerable to cheaper alternatives
- Greater fragmentation expected in competitive landscape
- Distribution is mainly via modern grocery retailers

### 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 United Arab Emirates

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Longevity science trend drives skin care growth
- Luxury brands look to further distinguish themselves
- Scent in skin care making a comeback

#### PROSPECTS AND OPPORTUNITIES

- Featuring real consumers and Middle Eastern faces in marketing campaigns
- Hybridisation is the next wave to influence skin care
- Mindset makeovers

### 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 United Arab Emirates

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Skinification trend drives demand for multifunctional products
- Consumers increasingly seek natural sun care products
- Category leaders remain unchanged

#### PROSPECTS AND OPPORTUNITIES

- Awareness of risks associated with sun exposure growing, but more is needed
- Vegan and organic labels set to come to the fore in self-tanning
- Innovation around ingredients

#### 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 United Arab Emirates

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- “Millionaire Migration” boosts premium sales
- In-store experience remains important for affluent consumers
- Dior opens its first spa in Dubai

#### PROSPECTS AND OPPORTUNITIES

- Beauty loyalty programmes build communities
- Brands embark on premiumisation strategy
- Rising influence of social media on consumers' purchasing decisions

#### 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 United Arab Emirates

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Price sensitivity on the rise amid rising rent, driving demand for mass products

“Dupe” culture is gaining momentum in local market

Asian brands continue to enjoy growth

#### PROSPECTS AND OPPORTUNITIES

Rise of dermocosmetics as health and beauty claims synchronise

Multinationals to continue leading sales of mass beauty and personal care

Premium ingredients offer growth opportunities for mass brands

#### 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-united-arab-emirates/report](http://www.euromonitor.com/beauty-and-personal-care-in-the-united-arab-emirates/report).