

Beauty and Personal Care in New Zealand

July 2025

Table of Contents

Beauty and Personal Care in New Zealand

EXECUTIVE SUMMARY

Beauty and personal care in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

What next for beauty and personal care?

MARKET DATA

- Table 1 Sales of Beauty and Personal Care by Category: Value 2019-2024
- Table 2 Sales of Beauty and Personal Care by Category: % Value Growth 2019-2024
- Table 3 GBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 4 NBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 5 LBN Brand Shares of Beauty and Personal Care: % Value 2021-2024
- Table 6 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2019-2024
- Table 7 Distribution of Beauty and Personal Care by Format: % Value 2019-2024
- Table 8 Distribution of Beauty and Personal Care by Format and Category: % Value 2024
- Table 9 Forecast Sales of Beauty and Personal Care by Category: Value 2024-2029
- Table 10 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Positive growth for baby and child-specific products despite economic concerns

Mainstream brands maintain leading positions, despite the growth of private label

Limited movement in channels of distribution, as consumers are slow to adopt e-commerce

PROSPECTS AND OPPORTUNITIES

Ongoing sales supported by baseline demand

Awareness of personal care needs are rising among younger generations

Companies will continue to innovate through use of ingredients

CATEGORY DATA

- Table 11 Sales of Baby and Child-specific Products by Category: Value 2019-2024
- Table 12 Sales of Baby and Child-specific Products by Category: % Value Growth 2019-2024
- Table 13 Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2019-2024
- Table 14 NBO Company Shares of Baby and Child-specific Products: % Value 2020-2024
- Table 15 LBN Brand Shares of Baby and Child-specific Products: % Value 2021-2024
- Table 16 LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2021-2024
- Table 17 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2021-2024
- Table 18 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2021-2024
- Table 19 Forecast Sales of Baby and Child-specific Products by Category: Value 2024-2029
- Table 20 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2024-2029
- Table 21 Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2024-2029

Bath and Shower in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Steady demand for bath and shower products as they form an integral feature of personal care routines Colgate-Palmolive holds its lead over Unilever

Supermarkets remain the leading distribution channel, with strongest growth seen in e-commerce

PROSPECTS AND OPPORTUNITIES

Steady forecast for the bath and shower category due to stable demand Mainstream brands expected to consolidate their market positions Limited innovation expected as brands focus on more dynamic categories

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2019-2024

Table 23 - Sales of Bath and Shower by Category: % Value Growth 2019-2024

Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2019-2024

Table 25 - NBO Company Shares of Bath and Shower: % Value 2020-2024

Table 26 - LBN Brand Shares of Bath and Shower: % Value 2021-2024

Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2021-2024

Table 28 - Forecast Sales of Bath and Shower by Category: Value 2024-2029

Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2024-2029

Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2024-2029

Colour Cosmetics in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Lip products lead growth, while hybrid face make-up sustains resilience Masstige momentum reshapes competitive dynamics in New Zealand

Beauty specialists and pharmacies retain dominance, while e-commerce solidifies its role in colour cosmetics

PROSPECTS AND OPPORTUNITIES

Steady sales expected thanks to baseline demand and economic recovery

Masstige momentum and immersive retail to shape the future of colour cosmetics

Hybrid beauty redefines relevance in daily routines

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2019-2024

Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2019-2024

Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2020-2024

Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2021-2024

Table 35 - LBN Brand Shares of Eye Make-up: % Value 2021-2024

Table 36 - LBN Brand Shares of Facial Make-up: % Value 2021-2024

Table 37 - LBN Brand Shares of Lip Products: % Value 2021-2024

Table 38 - LBN Brand Shares of Nail Products: % Value 2021-2024

Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2021-2024

Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2024-2029

Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2024-2029

Deodorants in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consistent demand for deodorants, despite cost-of-living pressures

Unilever's strong brand presence results in a mature competitive landscape

Consumers continue to prefer supermarkets for essential personal care products

PROSPECTS AND OPPORTUNITIES

Consistent demand for deodorants will boost stronger sales

Mass deodorants will continue to drive category performance

Product innovation blurring the lines between deodorants and fragrances

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2019-2024

Table 43 - Sales of Deodorants by Category: % Value Growth 2019-2024

Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2019-2024

Table 45 - NBO Company Shares of Deodorants: % Value 2020-2024

Table 46 - LBN Brand Shares of Deodorants: % Value 2021-2024

Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2021-2024

Table 48 - Forecast Sales of Deodorants by Category: Value 2024-2029

Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2024-2029

Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2024-2029

Depilatories in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sluggish growth for depilatories as category starts to mature

Top brands leverage brand reputations and consumer awareness to maintain their positions

Supermarkets maintain popularity in a cross-category trend

PROSPECTS AND OPPORTUNITIES

Low and steady growth expected as the category matures

Adapting to changing consumer perceptions of beauty and personal care

Focus on skin health to be the main driver of innovation in the category

CATEGORY DATA

Table 51 - Sales of Depilatories by Category: Value 2019-2024

Table 52 - Sales of Depilatories by Category: % Value Growth 2019-2024

Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2020-2024

Table 54 - NBO Company Shares of Depilatories: % Value 2020-2024

Table 55 - LBN Brand Shares of Depilatories: % Value 2021-2024

Table 56 - Forecast Sales of Depilatories by Category: Value 2024-2029

Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2024-2029

Fragrances in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fragrances maintain a positive performance, despite uncertain economic conditions

Elizabeth Arden and L'Oréal maintain their leading places

Department stores maintain lead, with pharmacies and e-commerce also attracting consumers' attention

PROSPECTS AND OPPORTUNITIES

A positive outlook for fragrances as consumer spending recovers

The retail experience will continue to play an integral feature in sales of fragrances

New scents will drive product innovation to excite and appeal to consumers

CATEGORY DATA

- Table 58 Sales of Fragrances by Category: Value 2019-2024
- Table 59 Sales of Fragrances by Category: % Value Growth 2019-2024
- Table 60 NBO Company Shares of Fragrances: % Value 2020-2024
- Table 61 LBN Brand Shares of Fragrances: % Value 2021-2024
- Table 62 LBN Brand Shares of Premium Men's Fragrances: % Value 2021-2024
- Table 63 LBN Brand Shares of Premium Women's Fragrances: % Value 2021-2024
- Table 64 Forecast Sales of Fragrances by Category: Value 2024-2029
- Table 65 Forecast Sales of Fragrances by Category: % Value Growth 2024-2029

Hair Care in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sluggish performance for hair care, with baseline demand but restricted spending

Fierce competition between the leading big names

Supermarkets remain the go-to destination for hair care products

PROSPECTS AND OPPORTUNITIES

Low and steady growth for hair care, due to baseline demand

Opportunities for raising consumer awareness about best practices for hair care

Personalisation and catering to specific needs to drive innovation

CATEGORY DATA

- Table 66 Sales of Hair Care by Category: Value 2019-2024
- Table 67 Sales of Hair Care by Category: % Value Growth 2019-2024
- Table 68 Sales of Hair Care by Premium vs Mass: % Value 2019-2024
- Table 69 NBO Company Shares of Hair Care: % Value 2020-2024
- Table 70 NBO Company Shares of Salon Professional Hair Care: % Value 2020-2024
- Table 71 LBN Brand Shares of Hair Care: % Value 2021-2024
- Table 72 LBN Brand Shares of Colourants: % Value 2021-2024
- Table 73 LBN Brand Shares of Salon Professional Hair Care: % Value 2021-2024
- Table 74 LBN Brand Shares of Styling Agents: % Value 2021-2024
- Table 75 LBN Brand Shares of Premium Hair Care: % Value 2021-2024
- Table 76 Forecast Sales of Hair Care by Category: Value 2024-2029
- Table 77 Forecast Sales of Hair Care by Category: % Value Growth 2024-2029
- Table 78 Forecast Sales of Hair Care by Premium vs Mass: % Value 2024-2029

Men's Grooming in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Men's grooming supported by changing social norms

Major international companies Unilever and Procter & Gamble lead men's grooming

Supermarket retailers continue to retain customers through accessibility and value

PROSPECTS AND OPPORTUNITIES

Sales in men's grooming will continue to be supported by an increased focus on men's personal care routines

Opportunities for companies to be at forefront of changing social norms for men

Ingredient-led innovation can help to drive new product development and growth

CATEGORY DATA

- Table 79 Sales of Men's Grooming by Category: Value 2019-2024
- Table 80 Sales of Men's Grooming by Category: % Value Growth 2019-2024
- Table 81 Sales of Men's Razors and Blades by Type: % Value Breakdown 2021-2024
- Table 82 Sales of Men's Skin Care by Type: % Value Breakdown 2021-2024
- Table 83 NBO Company Shares of Men's Grooming: % Value 2020-2024
- Table 84 LBN Brand Shares of Men's Grooming: % Value 2021-2024
- Table 85 LBN Brand Shares of Men's Razors and Blades: % Value 2021-2024
- Table 86 Forecast Sales of Men's Grooming by Category: Value 2024-2029
- Table 87 Forecast Sales of Men's Grooming by Category: % Value Growth 2024-2029

Oral Care in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Oral care category maintains healthy growth thanks to consistent consumer demand for oral hygiene Colgate-Palmolive maintains its lead and grows its share

Supermarkets remain primary retailers for oral care

PROSPECTS AND OPPORTUNITIES

Positive forecast for oral care products as demand for electric toothbrushes increase

Tooth whitening has opportunities for further growth as part of consumer personal care routines

Premiumisation to lead innovation within oral care

CATEGORY DATA

- Table 88 Sales of Oral Care by Category: Value 2019-2024
- Table 89 Sales of Oral Care by Category: % Value Growth 2019-2024
- Table 90 Sales of Toothbrushes by Category: Value 2019-2024
- Table 91 Sales of Toothbrushes by Category: % Value Growth 2019-2024
- Table 92 Sales of Toothpaste by Type: % Value Breakdown 2020-2024
- Table 93 NBO Company Shares of Oral Care: % Value 2020-2024
- Table 94 LBN Brand Shares of Oral Care: % Value 2021-2024
- Table 95 LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2021-2024
- Table 96 LBN Brand Shares of Toothpaste: % Value 2021-2024
- Table 97 Forecast Sales of Oral Care by Category: Value 2024-2029
- Table 98 Forecast Sales of Oral Care by Category: % Value Growth 2024-2029
- Table 99 Forecast Sales of Toothbrushes by Category: Value 2024-2029
- Table 100 Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029

Skin Care in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Skin care sales underpinned by accessible innovation and ingredient-led trends

L'Oréal maintains lead and grows its share

Health and beauty specialists lead skin care

PROSPECTS AND OPPORTUNITIES

Ongoing steady sales expected for skin care, boosted by wellness trends, efficacy, and sustainability

Streamlined efficacy meets accessible retail

Innovation to focus on efficacy, ethics, and simplified solutions

CATEGORY DATA

Table 101 - Sales of Skin Care by Category: Value 2019-2024

Table 102 - Sales of Skin Care by Category: % Value Growth 2019-2024

Table 103 - NBO Company Shares of Skin Care: % Value 2020-2024

Table 104 - LBN Brand Shares of Skin Care: % Value 2021-2024

Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2021-2024

Table 106 - LBN Brand Shares of Anti-agers: % Value 2021-2024

Table 107 - LBN Brand Shares of Firming Body Care: % Value 2021-2024

Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2021-2024

Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2021-2024

Table 110 - Forecast Sales of Skin Care by Category: Value 2024-2029

Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2024-2029

Sun Care in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sun care sees ongoing growth, thanks to rising awareness of the need to protect skin from the sun Cancer Society retains leadership in sun care, while L'Oréal New benefits from dermocosmetics and masstige innovation Supermarkets remain the core channel for sun care, while e-commerce continues to grow

PROSPECTS AND OPPORTUNITIES

Sun care from a summer staple to a daily essential

Regulatory reform and consumer advocacy set the stage for a more transparent and resilient sun care market Innovation and sustainability to drive trends

CATEGORY DATA

Table 112 - Sales of Sun Care by Category: Value 2019-2024

Table 113 - Sales of Sun Care by Category: % Value Growth 2019-2024

Table 114 - NBO Company Shares of Sun Care: % Value 2020-2024

Table 115 - LBN Brand Shares of Sun Care: % Value 2021-2024

Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2021-2024

Table 117 - Forecast Sales of Sun Care by Category: Value 2024-2029

Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2024-2029

Premium Beauty and Personal Care in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Premium beauty and personal care remains resilient, despite economic uncertainty

Estée Lauder and L'Oréal benefit from their strong premium portfolios

Sustainability trends influence consumer purchasing decisions

PROSPECTS AND OPPORTUNITIES

Premium beauty and personal care products to experience steady growth driven by adult sun care products

Experiential retail to play an important role in encouraging consumer spending

Local branding and ingredients to be a core element of innovation

CATEGORY DATA

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2019-2024

Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2020-2024

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2021-2024

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2024-2029

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2024-2029

Mass Beauty and Personal Care in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Decelerating growth as consumer spending is curbed due to cost of living

Top companies leverage brand reputation to maintain share

Social media acts as a key advertising method for mass-positioned products

PROSPECTS AND OPPORTUNITIES

Recovery of consumer spending to give a boost to mass beauty and personal care sales
Efficacy of products can help to drive sales at lower price points
Sustainability and ethical production will be key elements of innovation

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2019-2024

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2020-2024

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2021-2024

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2024-2029

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2024-2029

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-new-zealand/report.