



# Beauty and Personal Care in Middle East and Africa

July 2024

## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Dynamic CAGR for Middle East and Africa over the review period

Beauty and personal care on a positive growth path since 2020's decline

Hair care the largest category in Middle East and Africa

Sales of fragrances continue to see strong growth in Saudi Arabia

Strong growth for dermocosmetics in Morocco in recent years

Saudi Arabia adds the most new sales over 2018-2023

Natural ingredients an increasingly popular trend among Saudi Arabian consumers

Premium products helping to drive value growth in the United Arab Emirates

Grocery retailers and health and beauty specialists dominate sales

Supermarkets and beauty specialists the leading individual channels

Israel leads the way regionally in online shopping

## LEADING COMPANIES AND BRANDS

Relatively fragmented competitive landscapes in most countries

Further emergence of local beauty and personal care players in South Africa

Saudi Arabia the biggest market for more than half of the top 10 players

Nivea continues to lead, with Colgate the main mover in the rankings over 2018-2023

## FORECAST PROJECTIONS

Positive volume and value growth expected throughout the forecast period

Rising numbers of tourists and women in the workforce to help drive growth in Saudi Arabia

Natural trend expected to exert a growing influence on Israeli beauty and personal care

## COUNTRY SNAPSHOTS

Algeria: Market Context

Algeria: Competitive and Retail Landscape

Cameroon: Market Context

Cameroon: Competitive and Retail Landscape

Egypt: Market Context

Egypt: Competitive and Retail Landscape

Israel: Market Context

Israel: Competitive and Retail Landscape

Kenya: Market Context

Kenya: Competitive and Retail Landscape

Morocco: Market Context

Morocco: Competitive and Retail Landscape

Nigeria: Market Context

Nigeria: Competitive and Retail Landscape

Saudi Arabia: Market Context

Saudi Arabia: Competitive and Retail Landscape

South Africa: Market Context

South Africa: Competitive and Retail Landscape

Tunisia: Market Context

Tunisia: Competitive and Retail Landscape

United Arab Emirates: Market Context

United Arab Emirates: Competitive and Retail Landscape

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