



# Passport

## Skin Care in the United Arab Emirates

Euromonitor International

May 2022

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Some content and data have been changed.

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# LIST OF CONTENTS AND TABLES

Skin Care in the United Arab Emirates - Category Analysis .....	1
KEY DATA FINDINGS.....	1
2021 DEVELOPMENTS.....	1
TikTok pushes trends in skin care .....	1
DIY trend and self-pampering continues.....	1
Premium rebounds after mass segment outperforms previous year.....	2
PROSPECTS AND OPPORTUNITIES.....	2
Multi-brand retailers rise in popularity .....	2
Clinical interventions pose risk to skin care .....	2
Asian skin care lines offer strong growth potential.....	3
CATEGORY DATA.....	3
Table 1    Sales of Skin Care by Category: Value 2016-2021 .....	3
Table 2    Sales of Skin Care by Category: % Value Growth 2016-2021 .....	4
Table 3    NBO Company Shares of Skin Care: % Value 2017-2021.....	5
Table 4    LBN Brand Shares of Skin Care: % Value 2018-2021 .....	5
Table 5    LBN Brand Shares of Basic Moisturisers: % Value 2018-2021 .....	6
Table 6    LBN Brand Shares of Anti-agers: % Value 2018-2021.....	7
Table 7    LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2018- 2021 .....	7
Table 8    LBN Brand Shares of General Purpose Body Care: % Value 2018- 2021 .....	8
Table 9    LBN Brand Shares of Premium Skin Care: % Value 2018-2021 .....	8
Table 10   Forecast Sales of Skin Care by Category: Value 2021-2026 .....	9
Table 11   Forecast Sales of Skin Care by Category: % Value Growth 2021-2026.....	10
Beauty and Personal Care in the United Arab Emirates - Industry Overview .....	11
EXECUTIVE SUMMARY.....	11
Beauty and personal care in 2021: The big picture .....	11
2021 key trends.....	11
Competitive landscape .....	11
Retailing developments .....	12
What next for beauty and personal care? .....	12
Chart 1    Beauty and Personal Care Value Sales Growth Scenarios: 2019-2026.....	13
Chart 2    Beauty and Personal Care Impact of Soft Drivers on Value Sales: 2019-2026.....	13
MARKET DATA.....	14
Table 12   Sales of Beauty and Personal Care by Category: Value 2016-2021 .....	14
Table 13   Sales of Beauty and Personal Care by Category: % Value Growth 2016-2021 .....	14
Table 14   GBO Company Shares of Beauty and Personal Care: % Value 2017- 2021 .....	15
Table 15   NBO Company Shares of Beauty and Personal Care: % Value 2017- 2021 .....	16
Table 16   LBN Brand Shares of Beauty and Personal Care: % Value 2018-2021 .....	16
Table 17   Penetration of Private Label in Beauty and Personal Care by Category: % Value 2016-2021 .....	17

Table 18	Distribution of Beauty and Personal Care by Format: % Value 2016-2021 .....	17
Table 19	Distribution of Beauty and Personal Care by Format and Category: % Value 2021 .....	18
Table 20	Forecast Sales of Beauty and Personal Care by Category: Value 2021-2026 .....	20
Table 21	Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2021-2026 .....	20
DISCLAIMER .....		21
SOURCES.....		21
Summary 1	Research Sources.....	21

# SKIN CARE IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## KEY DATA FINDINGS



## 2021 DEVELOPMENTS

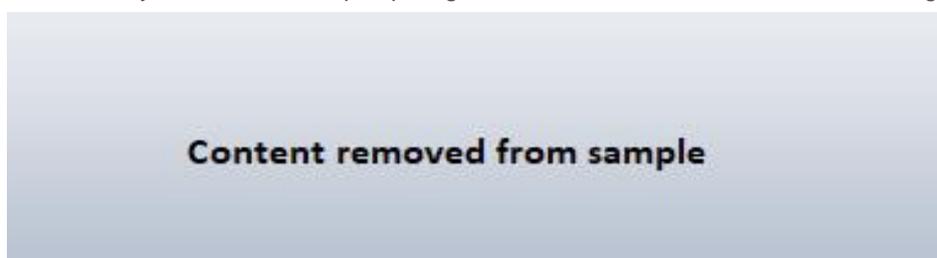
### TikTok pushes trends in skin care

TikTok has taken the United Arab Emirates by storm where some self-styled influencers...



### DIY trend and self-pampering continues

DIY beauty routines and self-pampering continued to resonate in 2021, as increasing...



## Premium rebounds after mass segment outperforms previous year

The premium segment of beauty and personal care was more negatively impacted by channel...

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## PROSPECTS AND OPPORTUNITIES

### Multi-brand retailers rise in popularity

Multi-brand retailers are benefiting from consumers' extensive research into the products they...

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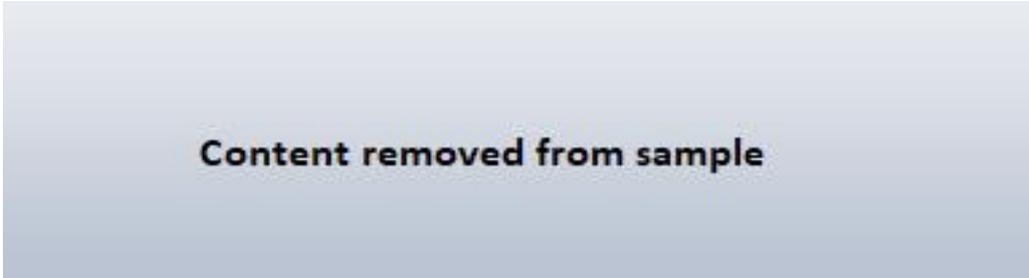
### Clinical interventions pose risk to skin care

The United Arab Emirates is home to a multitude of cosmetic surgery and aesthetic...

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### Asian skin care lines offer strong growth potential

Japan and South Korea are markets with strong domestic skin care lines, and the popularity...



### CATEGORY DATA

Table 1 Sales of Skin Care by Category: Value 2016-2021

AED million	2016	2017	2018	2019	2020	2021
Body Care	Data removed from sample					
- Firming/Anti-Cellulite Body Care						
-- Premium Firming/Anti-Cellulite Body Care						
-- Mass Firming/Anti-Cellulite Body Care						
- General Purpose Body Care						
-- Premium General Purpose Body Care						
-- Mass General Purpose Body Care						
Facial Care						
- Acne Treatments						
-- Premium Acne Treatments						
-- Mass Acne Treatments						
- Face Masks						
-- Premium Face Masks						
-- Mass Face Masks						
- Facial Cleansers						
-- Liquid/Cream/Gel/Bar Cleansers						
--- Premium Liquid/Cream/Gel/Bar Cleansers						
--- Mass Liquid/Cream/Gel/Bar Cleansers						
-- Facial Cleansing Wipes						
--- Premium Facial Cleansing Wipes						
--- Mass Facial Cleansing Wipes						
- Moisturisers And Treatments						
-- Basic Moisturisers						

- Premium Basic Moisturisers
- Mass Basic Moisturisers
- Anti-Agers
- Premium Anti-Agers
- Mass Anti-Agers
- Lip Care
- Premium Lip Care
- Mass Lip Care
- Toners
- Premium Toners
- Mass Toners
- Hand Care
- Premium Hand Care
- Mass Hand Care
- Skin Care Sets/Kits
- Premium Skin Care Sets/Kits
- Mass Skin Care Sets/Kits
- Skin Care



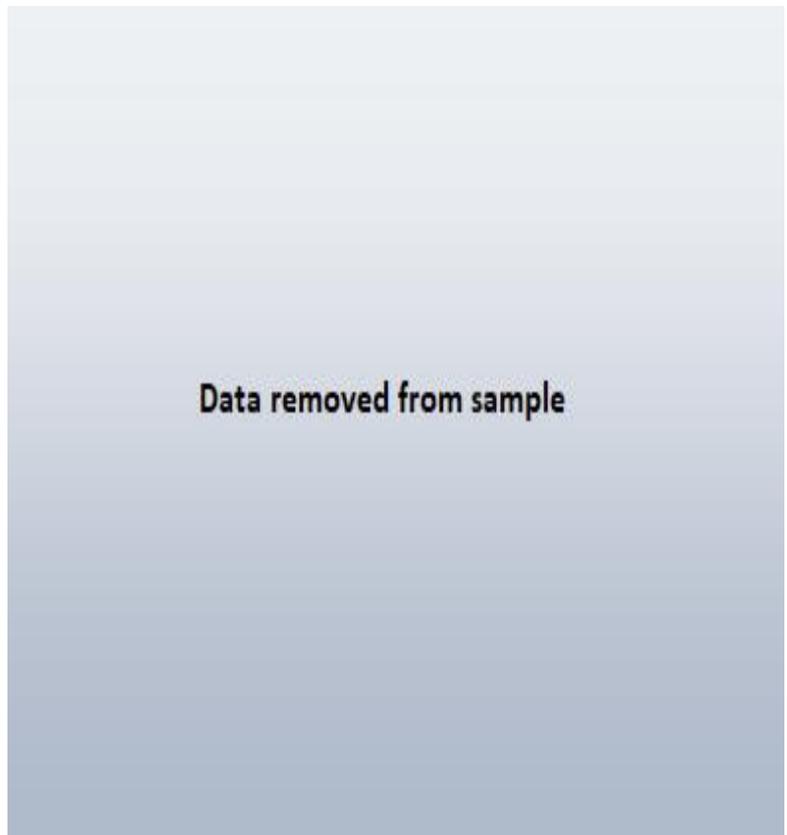
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2 Sales of Skin Care by Category: % Value Growth 2016-2021**

% current value growth

2020/21      2016-21 CAGR      2016/21 Total

- Body Care
- Firming/Anti-Cellulite Body Care
- Premium Firming/Anti-Cellulite Body Care
- Mass Firming/Anti-Cellulite Body Care
- General Purpose Body Care
- Premium General Purpose Body Care
- Mass General Purpose Body Care
- Facial Care
- Acne Treatments
- Premium Acne Treatments
- Mass Acne Treatments
- Face Masks
- Premium Face Masks
- Mass Face Masks
- Facial Cleansers
- Liquid/Cream/Gel/Bar Cleansers
- Premium Liquid/Cream/Gel/Bar Cleansers
- Mass Liquid/Cream/Gel/Bar Cleansers
- Facial Cleansing Wipes
- Premium Facial Cleansing Wipes
- Mass Facial Cleansing Wipes
- Moisturisers And Treatments
- Basic Moisturisers
- Premium Basic Moisturisers
- Mass Basic Moisturisers
- Anti-Agers
- Premium Anti-Agers



- Mass Anti-Agers
- Lip Care
- Premium Lip Care
- Mass Lip Care
- Toners
- Premium Toners
- Mass Toners
- Hand Care
- Premium Hand Care
- Mass Hand Care
- Skin Care Sets/Kits
- Premium Skin Care Sets/Kits
- Mass Skin Care Sets/Kits
- Skin Care



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 NBO Company Shares of Skin Care: % Value 2017-2021**

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------



Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 LBN Brand Shares of Skin Care: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



Total

Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5** LBN Brand Shares of Basic Moisturisers: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



Total

Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 LBN Brand Shares of Anti-agers: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



Total Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7 LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



Total Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8 LBN Brand Shares of General Purpose Body Care: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
<b>Data removed from sample</b>					

Total Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 9 LBN Brand Shares of Premium Skin Care: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
<b>Data removed from sample</b>					

Total Total

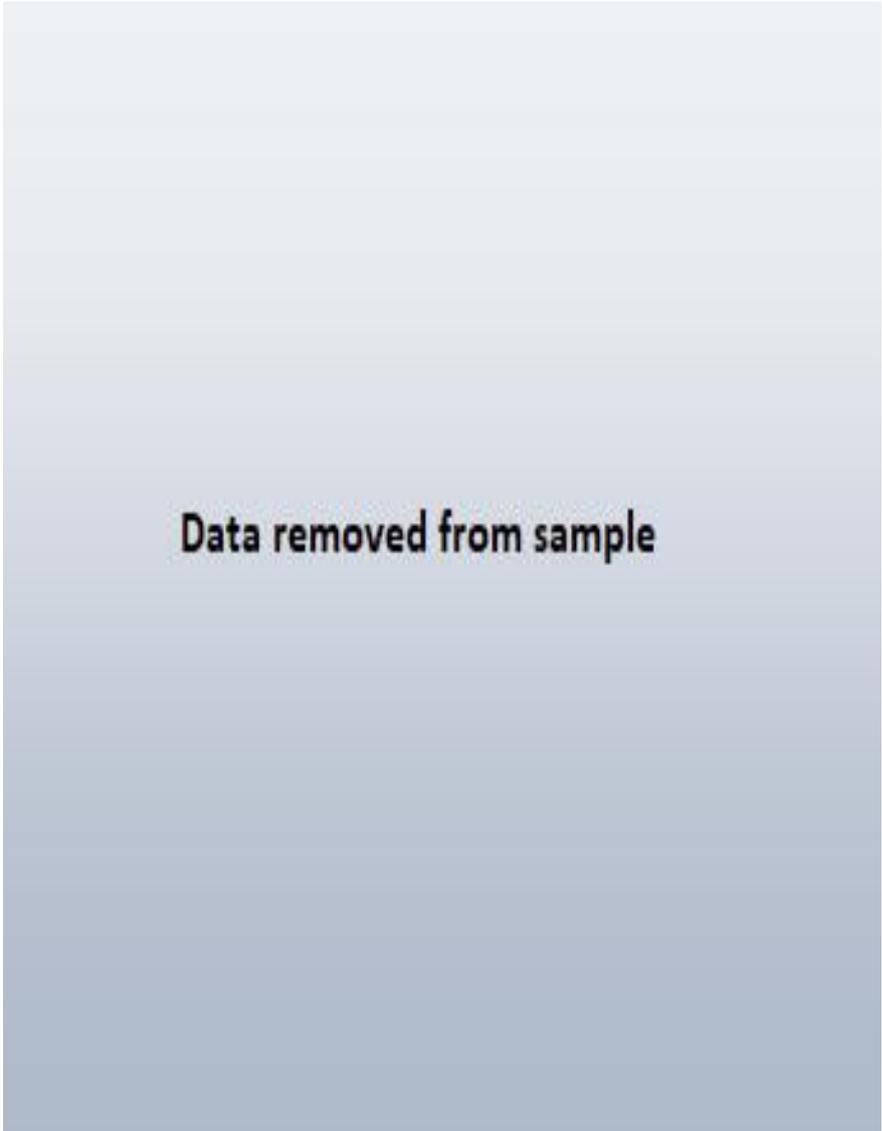
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 10 Forecast Sales of Skin Care by Category: Value 2021-2026**

AED million

	2021	2022	2023	2024	2025	2026
--	------	------	------	------	------	------

- Body Care
  - Firming/Anti-Cellulite Body Care
    - Premium Firming/Anti-Cellulite Body Care
    - Mass Firming/Anti-Cellulite Body Care
  - General Purpose Body Care
    - Premium General Purpose Body Care
    - Mass General Purpose Body Care
- Facial Care
  - Acne Treatments
    - Premium Acne Treatments
    - Mass Acne Treatments
  - Face Masks
    - Premium Face Masks
    - Mass Face Masks
  - Facial Cleansers
    - Liquid/Cream/Gel/Bar Cleansers
      - Premium Liquid/Cream/Gel/Bar Cleansers
      - Mass Liquid/Cream/Gel/Bar Cleansers
    - Facial Cleansing Wipes
      - Premium Facial Cleansing Wipes
      - Mass Facial Cleansing Wipes
  - Moisturisers And Treatments
    - Basic Moisturisers
      - Premium Basic Moisturisers
      - Mass Basic Moisturisers
    - Anti-Agers
      - Premium Anti-Agers
      - Mass Anti-Agers
  - Lip Care
    - Premium Lip Care
    - Mass Lip Care
  - Toners
    - Premium Toners
    - Mass Toners
- Hand Care
  - Premium Hand Care
  - Mass Hand Care
- Skin Care Sets/Kits
  - Premium Skin Care Sets/Kits



- Mass Skin Care Sets/  
Kits
- Skin Care

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 11 Forecast Sales of Skin Care by Category: % Value Growth 2021-2026**

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
-------------------------	-----------	--------------	---------------

- Body Care
  - Firming/Anti-Cellulite Body Care
  - Premium Firming/Anti-Cellulite Body Care
  - Mass Firming/Anti-Cellulite Body Care
  - General Purpose Body Care
  - Premium General Purpose Body Care
  - Mass General Purpose Body Care
- Facial Care
  - Acne Treatments
  - Premium Acne Treatments
  - Mass Acne Treatments
  - Face Masks
  - Premium Face Masks
  - Mass Face Masks
  - Facial Cleansers
  - Liquid/Cream/Gel/Bar Cleansers
  - Premium Liquid/Cream/Gel/Bar Cleansers
  - Mass Liquid/Cream/Gel/Bar Cleansers
  - Facial Cleansing Wipes
  - Premium Facial Cleansing Wipes
  - Mass Facial Cleansing Wipes
  - Moisturisers And Treatments
  - Basic Moisturisers
  - Premium Basic Moisturisers
  - Mass Basic Moisturisers
  - Anti-Agers
  - Premium Anti-Agers
  - Mass Anti-Agers
  - Lip Care
  - Premium Lip Care
  - Mass Lip Care
  - Toners
  - Premium Toners
  - Mass Toners
- Hand Care
  - Premium Hand Care
  - Mass Hand Care
- Skin Care Sets/Kits
  - Premium Skin Care Sets/Kits
  - Mass Skin Care Sets/Kits
- Skin Care



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# BEAUTY AND PERSONAL CARE IN THE UNITED ARAB EMIRATES - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Beauty and personal care in 2021: The big picture

In 2021, the United Arab Emirates witnessed gradual economic recovery, mainly due to a...

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### 2021 key trends

The last two years of the review period witnessed the “conscious” beauty movement growing...

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### Competitive landscape

The beauty and personal care competitive landscape in the United Arab Emirates in 2021...

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### Retailing developments

Store-based retailing is set to see only moderate gains over the forecast period and those that...

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### What next for beauty and personal care?

Mass products, and products with a masstige positioning, are expected to grow over the early...

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Chart 1 Beauty and Personal Care Value Sales Growth Scenarios: 2019-2026



Source: Euromonitor International

Note: C19 Pessimistic 1 represents a modelled scenario with an estimated probability of 25-35% over a 1-year horizon, factoring in macro drivers including GDP, stock prices, business and consumer confidence rates alongside infection rates, supply chain and labour supply disruption rates

Chart 2 Beauty and Personal Care Impact of Soft Drivers on Value Sales: 2019-2026



Source: Euromonitor International

Note: The above chart shows the growth decomposition split by macro drivers such as GDP per capita and population alongside soft drivers listed as having a positive (+) or negative (-) impact on the total growth rate

## MARKET DATA

**Table 12 Sales of Beauty and Personal Care by Category: Value 2016-2021**

AED million	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products	<b>Data removed from sample</b>					
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						
Dermocosmetics Beauty and Personal Care						
Beauty and Personal Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

**Table 13 Sales of Beauty and Personal Care by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baby and Child-specific Products	<b>Data removed from sample</b>		
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			
Premium Beauty and Personal Care			
Prestige Beauty and Personal Care			
Mass Beauty and Personal Care			

Dermocosmetics Beauty and Personal Care  
Beauty and Personal Care



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

Table 14 GBO Company Shares of Beauty and Personal Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

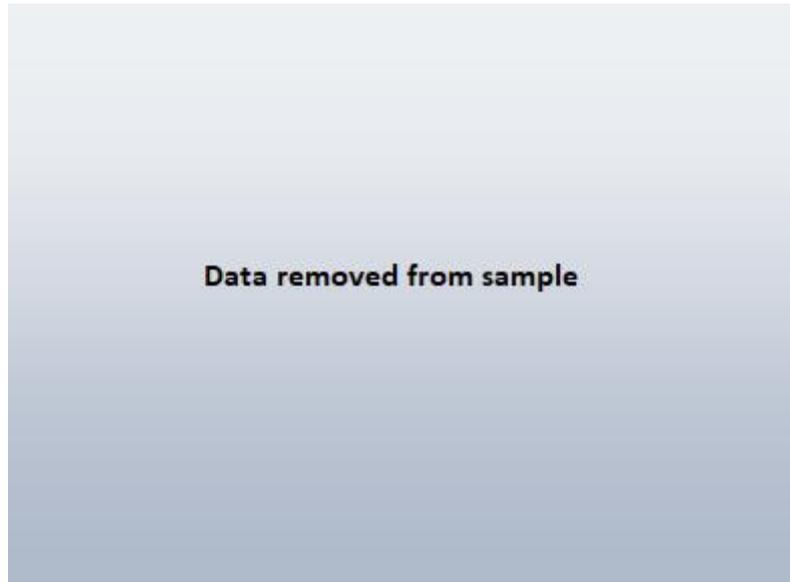


Others  
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 15 NBO Company Shares of Beauty and Personal Care: % Value 2017-2021**

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------



Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 16 LBN Brand Shares of Beauty and Personal Care: % Value 2018-2021**

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



Total Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 17 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2016-2021**

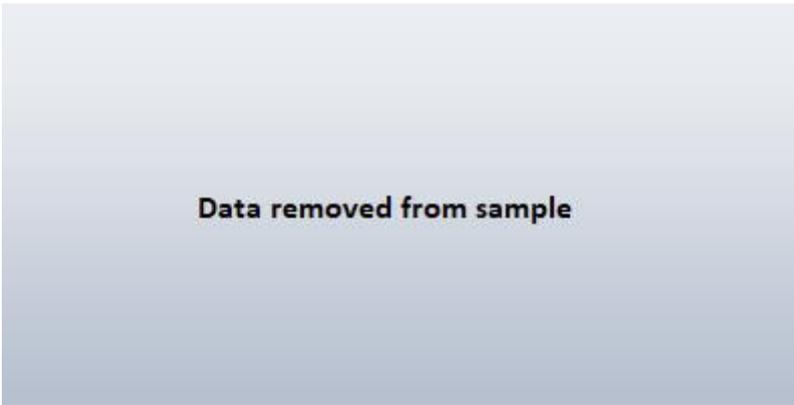
% retail value rsp	2016	2017	2018	2019	2020	2021
Baby and Child-specific Products	<b>Data removed from sample</b>					
Beauty and Personal Care						
Colour Cosmetics						
Mass Beauty and Personal Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 18 Distribution of Beauty and Personal Care by Format: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Apparel and Footwear Specialists						
-- Appliances and Electronics Specialists						
-- Health and Beauty Specialist						
--- Beauty Specialists						
--- Chemists/Pharmacies						
--- Drugstores/parapharmacies						
--- Other BPC Health and Beauty Specialist Retailers						
-- Home and Garden Specialist Retailers						
--- Homewares and Home Furnishing Stores						
-- Other Non-Grocery Retailers						

- Outdoor Markets
- Other BPC Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Non-retail channels
- Hair Salons
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 19**      **Distribution of Beauty and Personal Care by Format and Category: % Value 2021**

% retail value rsp

Baby and Child-specific Products	Bath and Shower	Colour Cosmetics	Deodorants	Depilatories	Fragrances
----------------------------------	-----------------	------------------	------------	--------------	------------

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Health and Beauty Specialist
- Beauty Specialists
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other BPC Health and Beauty Specialist Retailers
- Home and Garden Specialist Retailers
- Homewares and Home Furnishing Stores
- Other Non-Grocery

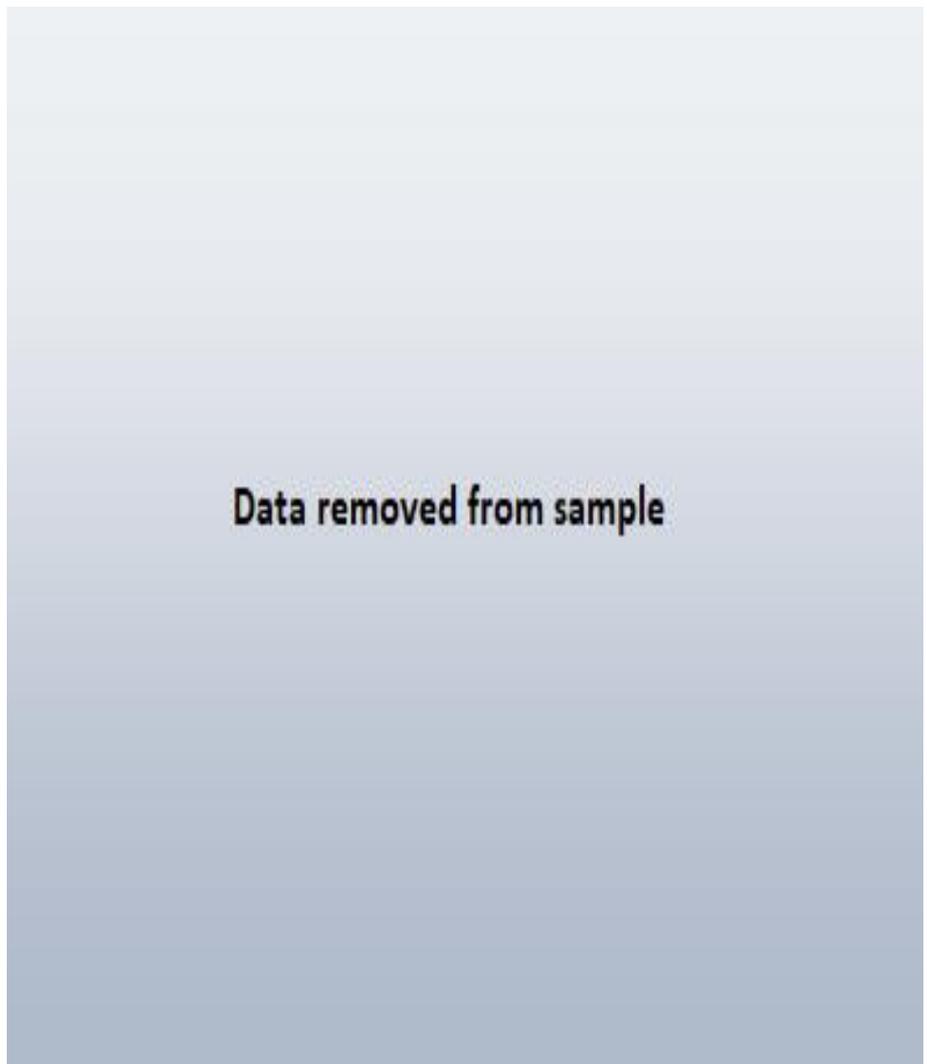


- Retailers
- Outdoor Markets
- Other BPC Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Non-retail channels
- Hair Salons
- Total



Hair Care      Men's Grooming      Oral Care      Skin Care      Sun Care

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Health and Beauty Specialist
- Beauty Specialists
- Chemists/Pharmacies
- Drugstores/parapharmacies
- Other BPC Health and Beauty Specialist Retailers
- Home and Garden Specialist Retailers
- Homewares and Home Furnishing Stores
- Other Non-Grocery Retailers
- Outdoor Markets
- Other BPC Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing



- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Non-retail channels
- Hair Salons
- Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SK = skin care; SU = sun care

**Table 20 Forecast Sales of Beauty and Personal Care by Category: Value 2021-2026**

AED million	2021	2022	2023	2024	2025	2026
Baby and Child-specific Products	<b>Data removed from sample</b>					
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						
Dermocosmetics Beauty and Personal Care						
Beauty and Personal Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources  
 Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care  
 Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

**Table 21 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2021-2026**

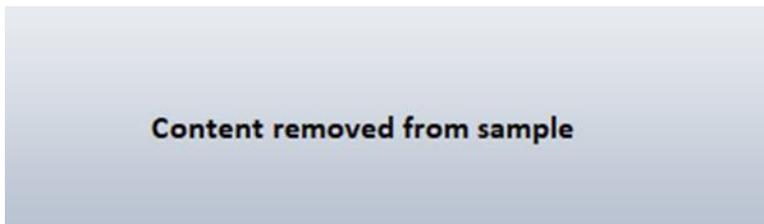
% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Baby and Child-specific Products	<b>Data removed from sample</b>		
Bath and Shower			
Colour Cosmetics			

- Deodorants
- Depilatories
- Fragrances
- Hair Care
- Men's Grooming
- Oral Care
- Oral Care Excl Power Toothbrushes
- Skin Care
- Sun Care
- Premium Beauty and Personal Care
- Prestige Beauty and Personal Care
- Mass Beauty and Personal Care
- Dermocosmetics Beauty and Personal Care
- Beauty and Personal Care



- Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
- Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

## DISCLAIMER

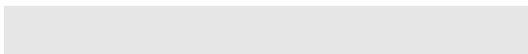


## SOURCES

Sources used during the research included the following:

### Summary 1 Research Sources

Official Sources



Trade Associations

Trade Press

Source: Euromonitor International

