



Beauty and Personal Care in Egypt

April 2024

Table of Contents

Beauty and Personal Care in Egypt

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Baby and child-specific products affected by price rises and import difficulties

Prioritising baby essentials: navigating spending amid economic challenges

Shift from brand loyalty to cost considerations for consumers

PROSPECTS AND OPPORTUNITIES

Johnson & Johnson to continue to lead in Egypt

The rise of local sunscreen brands in the face of economic challenges

Baby and child-specific products expected to grow in Egypt

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bath and shower sees growth

Local brands adapting to economic downturns and emerging stronger

Bar soap: affordability and longevity drive consumer preference

PROSPECTS AND OPPORTUNITIES

The power of nature: increased awareness of natural soap's benefits

Health and hygiene trends to positively influence growth in Egypt

Unilever maintains strong presence within bath and shower

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Evolving colour cosmetics landscape in Egypt

Unpredictable trade environment affects colour cosmetics

Rise of social media commerce: a new avenue for beauty products

PROSPECTS AND OPPORTUNITIES

Embracing minimalism in colour cosmetics purchases

Colour cosmetics set to see growth

L'Oréal Egypt LLC faces growing local competition in colour cosmetics

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Deodorants sees significant price increases
Pure alum: the budget friendly alternative to deodorants
Smart shopping strategies: the influence of discounters on consumer buying habits

PROSPECTS AND OPPORTUNITIES

The competitive landscape: big deodorant brands and clean labels in Egypt
Deodorants expected to see sales rise
Unilever Mashreq SAE to stay out in front

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Convenience and variety: the changing perception of women's blades
Consumers favouring local products
Electric shavers vs razors: understanding the consumer choice

PROSPECTS AND OPPORTUNITIES

Procter & Gamble Egypt SAE retains the lead
Understanding different consumer segments affects depilatories market
Ongoing demand for depilatories.

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fragrances sees strong growth
From high-end to high-value: the evolution of consumer perfume choices
The reshaping of retail: Al-Shaya Group's decisions reflect larger economic trends

PROSPECTS AND OPPORTUNITIES

The black market effect: doubled prices and limited choices for imported perfumes in Egypt
Challenging period ahead

MAC for Promoting Commercials Business to maintain lead in fragrances in Egypt

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hair care value up as volumes decline

Increasing awareness of hair care in Egypt

Local hair care brands are revolutionising the market

PROSPECTS AND OPPORTUNITIES

Unilever Mashreq SAE to retain lead in hair care

Silver revolution: embracing natural hair colours in a pricey market

Hair care to see growth

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men prefer simplified, economically friendly routines

Razors, blades, and deodorants: resilient categories in men's grooming amid economic difficulties

Price comparison tools utilised in consumer decision making

PROSPECTS AND OPPORTUNITIES

Lord Precision Industries SAE to maintain top spot

Flexibility factor: how mass manufacturers adapt to changing consumer needs

Men's grooming to see growth

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slight volume decline

Toothpaste remains resilient, while consumers hold back on replacing toothbrushes

Small packs, big savings

PROSPECTS AND OPPORTUNITIES

Competition and innovation amongst leading oral care players

Accessibility crisis: limited availability of imported dental floss and mouth rinse

Consumers keen to maintain effective oral health routines

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Skin care sees value rise as volumes fall

The rise of ingredient conscious consumers: skin care trends are shaping the market

Survival strategies for retailers in the face of economic hardship

PROSPECTS AND OPPORTUNITIES

L'Oréal Egypt LLC holds leading position in skin care

How social media is transforming the skin care industry

Growth ahead

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Sun care demand hit by economic situation
- Sun protection on a budget: exploring cheaper alternatives amid economic uncertainty
- Essential status behind consumers' decisions

PROSPECTS AND OPPORTUNITIES

- Beiersdorf Middle East leads sun care in Egypt
- The impact of wider product selection on consumer behaviour
- Sun care set to see rising sales

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Premium beauty and personal care faces obstacles
- Social media platforms elevate brand awareness
- Promotions for elevating premium brands' visibility

PROSPECTS AND OPPORTUNITIES

- The future of retail: the continuous expansion of e-commerce
- The future of premium beauty in Egypt
- MAC for Promoting Commercial Business leads premium beauty and personal care

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 Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mass beauty and personal care attracts budget conscious consumers

The new consumer mindset: embrace practicality over trends

The era of local brands

PROSPECTS AND OPPORTUNITIES

International companies compete alongside local players in fragmented industry

Exporting boosts the Egyptian manufacturing sector

The future of mass beauty in Egypt

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-egypt/report.