



Beauty and Personal Care in South Africa

May 2024

Table of Contents

Beauty and Personal Care in South Africa

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

More dynamic value growth driven by further price increases in 2023

Consumers stockpile baby and child-specific products when on promotion

Consumers remain loyal to products that work for their children

PROSPECTS AND OPPORTUNITIES

Natural ingredients to remain a priority for local consumers

Private label to become increasingly competitive

Consumers make more strategic decisions in terms of distribution channels

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bar soap retains high consumer preference due to affordability
Promotions encourage consumers to purchase body wash/shower gel
Hand sanitiser no longer a priority for many consumers

PROSPECTS AND OPPORTUNITIES

Opportunities for bath and shower products featuring natural ingredients
Bar soap addressing particular skin care issues to gain popularity
African black soap emerges in local market and will gain traction in coming years

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers seek more affordable colour cosmetics due to financial pressures
Ongoing competition for colour cosmetics from skin care
Premium brands try to remain competitive by introducing mini sizes

PROSPECTS AND OPPORTUNITIES

Opportunities for more hybrid colour cosmetics over the forecast period
Essence available in Ackermans to drive impulse purchases
Shein threatens colour cosmetics in South Africa

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers stockpile deodorants when they are on promotion
South Africans remain loyal to brands of deodorants
Chained drugstores remain popular destination for consumers due to discounts

PROSPECTS AND OPPORTUNITIES

Natural ingredients set to continue emerging in deodorants
Consumers increasingly seek vegan formulations for their children
The popular use of alternatives to deodorants in South Africa

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers seek most affordable depilatories during time of economic instability
Home-made options offer competition to depilatories in South Africa
Private label creates affordable options for consumers

PROSPECTS AND OPPORTUNITIES

Habit persistence to contribute to future positive performance of depilatories
Consumers increasingly buy affordable depilatories from Shien
Incorporating natural ingredients likely to attract health-conscious consumers

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fragrances perceived as non-essential by many local consumers
Fragrances tend to be purchased when offered on promotion
Consumers trade down to mass fragrances

PROSPECTS AND OPPORTUNITIES

The introduction of fragrances with Arabic origins to the South African market
Counterfeits threaten greater penetration of fragrances in South Africa

Premium fragrances set to mainly attract tourists

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

A strong focus on natural ingredients within hair care

Garnier releases new Hair Food range

Price-sensitive consumers still predominantly buy hair care when on promotion

PROSPECTS AND OPPORTUNITIES

Consumers to gain greater interest in vegan and cruelty-free hair care

Hair care routines can create opportunities for category players

Local brands of hair care attract South Africans

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Face masks enter men's grooming routines

African Extracts introduces men's skin care range

Grooming remains vital for most South Africans

PROSPECTS AND OPPORTUNITIES

Opportunities for men's skin care lies within ingredients

Brands offer skin care bundles to support grooming routines

Sorbet Man offers men's grooming services

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Promotions and sales events continue to drive volume sales of oral care

Teeth whitening remains a concern for some local consumers

Consumers prefer natural ingredients for their children's toothpaste

PROSPECTS AND OPPORTUNITIES

Opportunities for ingredient-led toothpaste over the forecast period

New tablet format of toothpaste emerges in South Africa

Sustainable bamboo manual toothbrushes set to gain popularity

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

New skin care brands enter local market

Brands that offer skin care analysis tend to attract local consumers

Apparel specialist Mr Price now offers its own skin care line

PROSPECTS AND OPPORTUNITIES

Consumers to increasingly consider purchasing ingredient-led skin care

Consumers to purchase domestic brands of skin care to support local economy

Premium packaging attracts South Africans

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Hybrid products offer sun protection to compete with sun care
- Increasing number of local brands launch sun protection
- Consumers seek sun protection that does not leave a white cast on their skin

PROSPECTS AND OPPORTUNITIES

- Sun protection to remain a key product in consumers' self-care routines
- Opportunities for different formats of sunscreen
- Sun care players likely to explore use of different 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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Premium brands offer travel sizes or mini versions of beauty and personal care
- Consumers still prefer mass beauty and personal care over premium products
- Limited innovation by premium brands in South Africa

PROSPECTS AND OPPORTUNITIES

- Consumers to shift further away from premium brands to support local products
- Opportunities for premium brands offered by loyalty membership schemes
- Consumers' priorities switch to skin care routines

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 South Africa

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mass beauty and personal care attracts cash-strapped consumers

South African consumers focus on supporting local brands

Mass beauty and personal care offers wider product range to attract consumers

PROSPECTS AND OPPORTUNITIES

Greater innovation within mass beauty and personal care likely

Local consumers seek sustainable products

Private label to remain popular

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-south-africa/report.