

Saudi Arabia Beauty And Personal Care - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Saudi Arabia Beauty And Personal Care Market Analysis

The Saudi Arabia beauty and personal care market is expected to grow from USD 7.56 billion in 2025 to USD 8.03 billion in 2026 and is forecast to reach USD 10.84 billion by 2031 at 6.17% CAGR over 2026-2031. This trajectory reflects structural shifts in consumer behavior, regulatory modernization, and the Kingdom's Vision 2030 agenda, which has elevated female workforce participation from 17.4% in 2017 to 36% by the first quarter of 2023, surpassing the program's original 30% target. Personal care holds the lion's share of current spending, yet decorative cosmetics deliver the quickest volume gains as liberalizing social norms encourage broader makeup usage among working women. Higher female labor participation, stringent halal certification, and Vision 2030 tourism targets form a multi-layered demand engine that rewards brands offering both efficacy and cultural alignment. Clean-beauty labels are scaling fast because natural formulations satisfy halal, ethical, and skin-health criteria while desert-proof technologies keep texture performance intact. Competitive intensity sits at a moderate level because multinational incumbents dominate the shelf, yet local digital-native challengers exploit influencer networks and regulatory familiarity to carve profitable niches.

Saudi Arabia Beauty And Personal Care Market Trends and Insights

High Social-Media Influence on Beauty Trends

Instagram's penetration among Gen Z Saudi females has transformed product discovery into a real-time, influencer-mediated

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process that compresses brand-building cycles. TikTok and Snapchat amplify this effect, with online beauty purchases now originating from social or chat commerce channels such as WhatsApp and Instagram Shopping. L'Oreal's positioning of Saudi Arabia as a USD 2 billion market with significant internet penetration underscores the platform's role as a demand generator, not merely a marketing channel. Brands that fail to maintain daily content cadence or secure micro-influencer partnerships risk invisibility among the 60% of Gen Z consumers who cite skincare as their top purchase motivation. This dynamic favors agile digital-native brands over legacy players with slower go-to-market processes.

Rising Demand for Halal-Certified Cosmetics

SFDA's mandatory halal certification for certain product categories and the GCC Standardization Organization's GSO 1943:2024 standard create a compliance framework that differentiates Saudi Arabia from secular markets. Halal certification extends beyond ingredient sourcing to encompass manufacturing processes, supply-chain traceability, and packaging materials, raising entry barriers for international brands unfamiliar with Islamic jurisprudence. Local brands such as AIZA leverage heritage ingredients like AlUla Peregrina oil, featured in Cartier's fragrance collaborations- to signal authenticity, while multinational entrants must navigate certification timelines that can extend 6 to 12 months. Most of the Middle Eastern consumer preference for natural and botanical ingredients intersects with halal mandates, creating a sweet spot for clean-beauty formulations that meet both ethical and religious criteria.

Stringent Regulatory Requirements Hinders Growth

SFDA's FASEH system mandates pre-market notification for all cosmetics and personal care products, requiring manufacturers to submit ingredient lists, safety data, and manufacturing-site certifications before commercial distribution. The GCC Standardization Organization's GSO 1943:2024 and GSO 2528 standards impose additional labeling, packaging, and quality-control requirements that international brands must navigate alongside Saudi-specific halal certification. Compliance timelines range from 2 to 6 months for straightforward products but can extend to 12 months for novel ingredients or claims requiring clinical substantiation. The 5% customs duty on cosmetics and toiletries, combined with Certificate of Origin, Commercial Invoice, Packing List, and Bill of Lading documentation requirements, adds 2 to 4 weeks to import cycles, disadvantaging brands reliant on just-in-time inventory models. These frictions favor multinational incumbents with dedicated regulatory affairs teams and local manufacturing footprints, such as L'Oreal's Jeddah facility, which bypasses import bottlenecks entirely.

Other drivers and restraints analyzed in the detailed report include:

Expanding Men's Grooming and Personal Care Usage
Rising Female Workforce Participation and Grooming Needs
Risk of Counterfeit and Low-Quality Products Undermining Trust

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Personal care's 86.64% share in 2025 reflects the segment's breadth, encompassing skincare, hair care, bath and shower, deodorants, and oral care, and its embeddedness in daily routines across all demographic cohorts. Cosmetics and makeup products, despite holding the remaining 13.36% share, are forecast to grow at 6.61% CAGR from 2026 to 2031, outpacing personal care's more modest expansion. This divergence stems from the low base effect in decorative cosmetics, where Saudi Arabia's cultural norms historically constrained usage, and the recent liberalization of social codes under Vision 2030, which has normalized makeup application in professional and social settings. Procter & Gamble's 2024 launch of Olay Regenerist Collagen Peptide 24 across the Middle East, including Saudi Arabia, exemplifies multinational's focus on anti-aging skincare within the personal care umbrella. Hair care benefits from the Kingdom's climate, which necessitates frequent washing and conditioning,

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while oral care maintains steady demand driven by public health campaigns. The cosmetics segment's acceleration is further propelled by social media tutorials that demystify application techniques, reducing the skill barrier that previously deterred novice users.

SFDA's cosmetovigilance system, which mandates adverse-event reporting for both personal care and cosmetics, ensures product safety but also imposes post-market surveillance costs that smaller brands struggle to absorb. Johnson & Johnson's 2024 expansion of its Neutrogena Hydro Boost line and launch of Aveeno Baby Eczema Therapy in Saudi Arabia illustrate how established players leverage regulatory compliance as a competitive moat. The personal care segment's maturity limits margin expansion opportunities, whereas cosmetics' premiumization potential, evidenced by Estee Lauder's Tom Ford Beauty launch, offers higher per-unit profitability. However, the instruction to minimize cosmetics content in this report aligns with personal care's dominant revenue contribution and its alignment with the market's utilitarian consumption patterns.

The mass category's 60.78% share in 2025 underscores price sensitivity among Saudi Arabia's broad consumer base, yet the premium segment's 6.62% CAGR from 2026 to 2031 signals a wealth effect among the Kingdom's expanding affluent class. Premium products' appeal lies in their dermatological validation, prestige packaging, and association with international luxury brands that confer social status. Shiseido's USD 400-500 million acquisition of Dr. Dennis Gross Skincare in February 2024, explicitly targeting Middle East expansion, reflects strategic conviction in premium growth. Paris Gallery's 65+ stores across the GCC, with significant Saudi presence, serve as premium distribution anchors, offering curated assortments and personalized consultations that mass retailers cannot replicate. The mass segment's resilience stems from its accessibility through supermarkets, hypermarkets, and neighborhood stores, which serve price-conscious consumers and those in smaller cities lacking specialty retail infrastructure.

Unilever's Dove "Real Beauty" campaign in Saudi Arabia during 2024, partnering with Noon.com for distribution, illustrates how mass-market brands are adopting premium marketing tactics, emotional storytelling, and influencer partnerships to defend share against trading-up consumers. The category bifurcation creates strategic dilemmas for mid-tier brands, which risk being squeezed between mass players' scale economies and premium brands' aspirational positioning. Bath & Body Works' opening of a flagship store in Riyadh Park in 2024, with plans for 10+ Saudi locations by 2025, represents a mass-premium hybrid strategy targeting the "affordable luxury" segment. The premium segment's growth will likely concentrate in Riyadh and Jeddah, where per-capita incomes exceed national averages, while the mass category retains dominance in secondary cities and rural areas.

The Saudi Arabia Beauty and Personal Care Market Report is Segmented by Product Type (Personal Care and Cosmetics/Makeup Products), Category (Premium and Mass), Ingredient Type (Natural and Organic, and Conventional/Synthetic), and Distribution Channel (Specialty Stores, Supermarkets/Hypermarkets, Online Retail, and Other Distribution Channels). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

L'Oreal S.A. Unilever PLC The Procter & Gamble Company The Estee Lauder Companies Inc. Beiersdorf AG Coty Inc. Shiseido Company, Limited Kao Corporation Henkel AG & Co. KGaA Revlon, Inc. Avon Products, Inc. Colgate-Palmolive Company LVMH Moët Hennessy Louis Vuitton SE Natura & Co Mary Kay Inc. The Body Shop International Ltd. Bath & Body Works, Inc. Wella Company Godrej Consumer Products Ltd. Johnson & Johnson

Additional Benefits:

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