



Euromonitor
International

Beauty and Personal Care in the Netherlands

May 2025

Table of Contents

EXECUTIVE SUMMARY

Beauty and personal care in 2024: The big picture
2024 key trends
Competitive landscape
Retail developments
What next for beauty and personal care?

MARKET DATA

- Table 1 - Sales of Beauty and Personal Care by Category: Value 2019-2024
- Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2019-2024
- Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2021-2024
- Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2019-2024
- Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2019-2024
- Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2024
- Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2024-2029
- Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail value growth driven by price increases
Unilever retains the lead but faces pressure from premium challengers
Supermarkets regain share with value and variety

PROSPECTS AND OPPORTUNITIES

Birth rate recovery and upmarket shift to support category growth
Unilever to retain leadership but face long-term erosion
E-commerce to reclaim growth as digital-native parents dominate

CATEGORY DATA

- Table 11 - Sales of Baby and Child-specific Products by Category: Value 2019-2024
- Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2019-2024
- Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2019-2024
- Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2020-2024
- Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2021-2024
- Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2021-2024
- Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2021-2024
- Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2021-2024
- Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2024-2029
- Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2024-2029
- Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2024-2029

Bath and Shower in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Value sales supported by skinification and price increases
Rituals leads through brand strength and consistent innovation
Drugstores dominate as consumers seek value and variety

PROSPECTS AND OPPORTUNITIES

Category shifts to extremes as mainstream brands lose appeal
Rituals to benefit from accessible luxury positioning
Limited growth expected for e-commerce in bath and shower

CATEGORY DATA

- Table 22 - Sales of Bath and Shower by Category: Value 2019-2024
- Table 23 - Sales of Bath and Shower by Category: % Value Growth 2019-2024
- Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2019-2024
- Table 25 - NBO Company Shares of Bath and Shower: % Value 2020-2024
- Table 26 - LBN Brand Shares of Bath and Shower: % Value 2021-2024
- Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2021-2024
- Table 28 - Forecast Sales of Bath and Shower by Category: Value 2024-2029
- Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2024-2029
- Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2024-2029

Colour Cosmetics in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Category rebounds with a renewed focus on complexion and self-expression
L'Oréal holds lead despite mounting pressure
Beauty specialists and e-commerce gain momentum

PROSPECTS AND OPPORTUNITIES

Value growth driven by premiumisation and education
Multistep routines to encourage broader consumption
Affordable luxury trend to shape product development

CATEGORY DATA

- Table 31 - Sales of Colour Cosmetics by Category: Value 2019-2024
- Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2019-2024
- Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2020-2024
- Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2021-2024
- Table 35 - LBN Brand Shares of Eye Make-up: % Value 2021-2024
- Table 36 - LBN Brand Shares of Facial Make-up: % Value 2021-2024
- Table 37 - LBN Brand Shares of Lip Products: % Value 2021-2024
- Table 38 - LBN Brand Shares of Nail Products: % Value 2021-2024
- Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2021-2024
- Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2024-2029
- Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2024-2029

Deodorants in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Steady growth in a mature category
Unilever remains dominant across multiple formats
Drugstores lead as consumers shop promotions

PROSPECTS AND OPPORTUNITIES

Value growth expected to continue
Ingredient scrutiny to fuel demand for 'clean' labels
E-commerce poised for a rebound

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2019-2024
Table 43 - Sales of Deodorants by Category: % Value Growth 2019-2024
Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2019-2024
Table 45 - NBO Company Shares of Deodorants: % Value 2020-2024
Table 46 - LBN Brand Shares of Deodorants: % Value 2021-2024
Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2021-2024
Table 48 - Forecast Sales of Deodorants by Category: Value 2024-2029
Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2024-2029
Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2024-2029

Depilatories in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Depilatories see growth, but razors come under pressure
P&G maintains a commanding lead
Drugstores remain the preferred channel

PROSPECTS AND OPPORTUNITIES

Premiumisation and price increases to support value growth
Travel remains a key seasonal driver
Drugstores and e-commerce to support accessibility

CATEGORY DATA

Table 51 - Sales of Depilatories by Category: Value 2019-2024
Table 52 - Sales of Depilatories by Category: % Value Growth 2019-2024
Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2020-2024
Table 54 - NBO Company Shares of Depilatories: % Value 2020-2024
Table 55 - LBN Brand Shares of Depilatories: % Value 2021-2024
Table 56 - Forecast Sales of Depilatories by Category: Value 2024-2029
Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2024-2029

Fragrances in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fragrances continue strong momentum
Global players maintain control, but challengers rise
Beauty specialists hold distribution lead

PROSPECTS AND OPPORTUNITIES

Fragrance sales to maintain upward trend
Gen Z drives growth through social influence

E-commerce to take a larger role in distribution

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2019-2024

Table 59 - Sales of Fragrances by Category: % Value Growth 2019-2024

Table 60 - NBO Company Shares of Fragrances: % Value 2020-2024

Table 61 - LBN Brand Shares of Fragrances: % Value 2021-2024

Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2021-2024

Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2021-2024

Table 64 - Forecast Sales of Fragrances by Category: Value 2024-2029

Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2024-2029

Hair Care in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price increases continue to drive category growth

L'Oréal maintains leadership position

Drugstores and supermarkets remain key channels

PROSPECTS AND OPPORTUNITIES

Consumers to embrace multi-step routines

Hair treatments to go mainstream

Specialist channels to benefit from premiumisation

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2019-2024

Table 67 - Sales of Hair Care by Category: % Value Growth 2019-2024

Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2019-2024

Table 69 - NBO Company Shares of Hair Care: % Value 2020-2024

Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2020-2024

Table 71 - LBN Brand Shares of Hair Care: % Value 2021-2024

Table 72 - LBN Brand Shares of Colourants: % Value 2021-2024

Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2021-2024

Table 74 - LBN Brand Shares of Styling Agents: % Value 2021-2024

Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2021-2024

Table 76 - Forecast Sales of Hair Care by Category: Value 2024-2029

Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2024-2029

Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2024-2029

Men's Grooming in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Men's grooming sees healthy growth, but opportunity remains untapped

Unilever maintains its lead in men's grooming

Drugstores remain key, but face growing competition

PROSPECTS AND OPPORTUNITIES

Men's grooming set for continued value growth

Dutch men to embrace more complex grooming routines

Sophisticated grooming habits to support e-commerce growth

CATEGORY DATA

Table 79 - Sales of Men's Grooming by Category: Value 2019-2024

Table 80 - Sales of Men's Grooming by Category: % Value Growth 2019-2024

Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2021-2024

Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2021-2024

Table 83 - NBO Company Shares of Men's Grooming: % Value 2020-2024

Table 84 - LBN Brand Shares of Men's Grooming: % Value 2021-2024

Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2021-2024

Table 86 - Forecast Sales of Men's Grooming by Category: Value 2024-2029

Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2024-2029

Oral Care in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Value growth supported by premiumisation and product upgrades

Procter & Gamble and Haleon lead the competitive landscape

Drugstores remain key, e-commerce gains traction

PROSPECTS AND OPPORTUNITIES

Category set for continued growth, led by electric toothbrushes

Health awareness drives investment in premium oral care

E-commerce will see moderate but steady expansion

CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2019-2024

Table 89 - Sales of Oral Care by Category: % Value Growth 2019-2024

Table 90 - Sales of Toothbrushes by Category: Value 2019-2024

Table 91 - Sales of Toothbrushes by Category: % Value Growth 2019-2024

Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2020-2024

Table 93 - NBO Company Shares of Oral Care: % Value 2020-2024

Table 94 - LBN Brand Shares of Oral Care: % Value 2021-2024

Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2021-2024

Table 96 - LBN Brand Shares of Toothpaste: % Value 2021-2024

Table 97 - Forecast Sales of Oral Care by Category: Value 2024-2029

Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2024-2029

Table 99 - Forecast Sales of Toothbrushes by Category: Value 2024-2029

Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029

Skin Care in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Skin care continues to record strong value growth

L'Oréal maintains lead, supported by a diverse portfolio

Drugstores remain dominant, but specialists gain share

PROSPECTS AND OPPORTUNITIES

Strong growth forecast as consumers invest in skin health

Dermocosmetics to maintain strong trajectory

E-commerce growth may plateau as offline channels remain relevant

CATEGORY DATA

- Table 101 - Sales of Skin Care by Category: Value 2019-2024
- Table 102 - Sales of Skin Care by Category: % Value Growth 2019-2024
- Table 103 - NBO Company Shares of Skin Care: % Value 2020-2024
- Table 104 - LBN Brand Shares of Skin Care: % Value 2021-2024
- Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2021-2024
- Table 106 - LBN Brand Shares of Anti-agers: % Value 2021-2024
- Table 107 - LBN Brand Shares of Firming Body Care: % Value 2021-2024
- Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2021-2024
- Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2021-2024
- Table 110 - Forecast Sales of Skin Care by Category: Value 2024-2029
- Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2024-2029

Sun Care in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Sun care faces pressure from steep price hikes and poor weather
- Private label challenges brand dominance
- Drugstores remain crucial to distribution

PROSPECTS AND OPPORTUNITIES

- Travel sector will be a key driver of sun care sales
- Skinification of sun care brings both opportunities and threats
- E-commerce to see steady but modest growth

CATEGORY DATA

- Table 112 - Sales of Sun Care by Category: Value 2019-2024
- Table 113 - Sales of Sun Care by Category: % Value Growth 2019-2024
- Table 114 - NBO Company Shares of Sun Care: % Value 2020-2024
- Table 115 - LBN Brand Shares of Sun Care: % Value 2021-2024
- Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2021-2024
- Table 117 - Forecast Sales of Sun Care by Category: Value 2024-2029
- Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2024-2029

Premium Beauty and Personal Care in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Premium gains momentum as consumers embrace affordable luxury
- L'Oréal maintains the lead, while influencer-backed brands capture youth interest
- Dermocosmetics drive trust and reshape premium positioning

PROSPECTS AND OPPORTUNITIES

- Premium to continue outperforming amid shifting consumer values
- Large international players to retain a competitive edge
- Retailers to double down on digital expansion for premium lines

CATEGORY DATA

- Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2019-2024
- Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2019-2024
- Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2020-2024

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2021-2024

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2024-2029

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2024-2029

Mass Beauty and Personal Care in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mass category growth remains positive but is overshadowed by premium performance

L'Oréal continues to dominate, while eco-conscious brands gain ground

Dermocosmetic positioning enhances trust and drives mass category growth

PROSPECTS AND OPPORTUNITIES

Steady outlook tempered by price fatigue and value-driven shopping

Private label to gain share amid cost-conscious consumer preferences

Dermocosmetic concepts set to influence adjacent categories

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2019-2024

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2020-2024

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2021-2024

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2024-2029

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2024-2029

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-the-netherlands/report.