Beauty and Personal Care in the Netherlands

May 2025

Table of Contents

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

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

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

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

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

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

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

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

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

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

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

Mass Beauty and Personal Care in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

PROSPECTS AND OPPORTUNITIES

CATEGORY DATA