SiGHT

a monthly series

SEPTEMBER | 2024

The concept of Beauty in the Middle East is **rich** and **complex**, deeply intertwined with **culture** and **tradition** while embracing **modernity** and **technology**.

Whether it's through **traditional** perfumes, **modern cosmetic** procedures, or **self-expression** on social media, **beauty remains a vital form of identity** and **social interaction** in the region.

The landscape of beauty is shaping itself into **a more well-rounded combination of inner beauty, outer beauty and wellness.**

Today's **Middle Eastern beauty standards** reflect a **dynamic fusion of age-old practices, multi-cultural influences, global trends, technological innovations** and **personal empowerment.**

"The Middle Eastern beauty aesthetic has become a mainstream and aspirational beauty ideal for both men and women globally."

- DR BIBI GHALAIE, FOUNDER OF DOCTOR BIBI CLINIC

2023 Top Beauty and Personal Care Markets

The **Middle East's beauty industry** is rapidly growing, blending tradition with modernity to attract a diverse consumer base.

As cities expand, disposable incomes increase, and a youthful population emerges, **the beauty market is transforming, positioning the region as a leading market** for beauty products and services.

$39,870M
KSA

$6,848M
UAE

$1,683M
EGYPT

$1,090M
KUWAIT

$772M
ALGERIA

$984M
MOROCCO

$637M
IRAQ

$729M
QATAR

$557M
TUNISIA

$557M
JORDAN

$559M
OMAN

$85M
LEBANON

> The beauty and personal care market in the Middle East and North Africa (MENA) region is currently worth over $46 billion & estimated to reach $60 billion by 2025.
> (British Beauty Council)

McKinsey based Euromonitor International released April 2023

A look at some of factors influencing the evolution of Beauty Standards

A shift from **Western Norms to Celebrating Indigenous Heritage**

A 2023 Chalhoub Group report, "Decoding the Beauty Consumer in the GCC," surveyed over 2,600 beauty consumers and found a shift towards an Arabic beauty ideal that emphasizes enhancing natural features rather than adhering to European standards. Influencer Huda Kattan is recognized for promoting Middle Eastern beauty.

A growing consciousness that **Beauty is more than just skin deep**

Recognition that beauty starts from within is shaping a more holistic approach to beauty, health and wellness. Brands are becoming conscious of portraying more humanized beauty and helping consumers especially women shape their sense of self.

A **reign of empowerment** among women in the Middle East

Beauty has transformed from a private concern among women to a symbol of changing social norms, allowing them to assert their identities and express themselves more openly in public.

Men want a share of the spotlight

Self-care and grooming for men are gaining importance in the Middle East, merging tradition with innovation. The GCC male grooming products market was valued at $4.2 million in 2023 and is expected to grow to $7.6 million by 2032.

Gen Z are re-shaping the norms of beauty

Gen Z advocates for cultural fusion and inclusivity, resisting conformity to Western ideals. They utilize fashion, beauty, and creative expression to challenge norms, creating a blend of modern and traditional styles.

Given the importance and size of the Beauty industry in the Middle East, we decided to capture the trends in 2 parts.

In this edition we look at some of the overarching trends that are re-shaping the Beauty landscape in the region.

In next month's edition, we will look into some of the trends by key categories like skin & personal care, make-up, and perfume.

Let's take a look at some of the trends re-shaping the Beauty landscape in the region...

How is it impacting and influencing consumer lifestyle & choices?

How can companies leverage any potential opportunities?

Key Trends shaping the Beauty Industry in the Middle East

Trend 1

A-Beauty takes centerstage

Trend 2

The quest for everlasting Youth

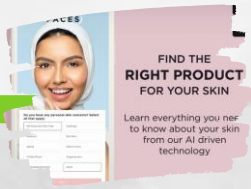
Trend 3

Blending ancient practices with modern lifestyle

Trend 4

Fusion of local & global influences

Trend 5



Personalization is the norm

Trend 6

Spotlight on Clean & Conscious beauty

Trend 7

Men - an important audience too

Trend 8

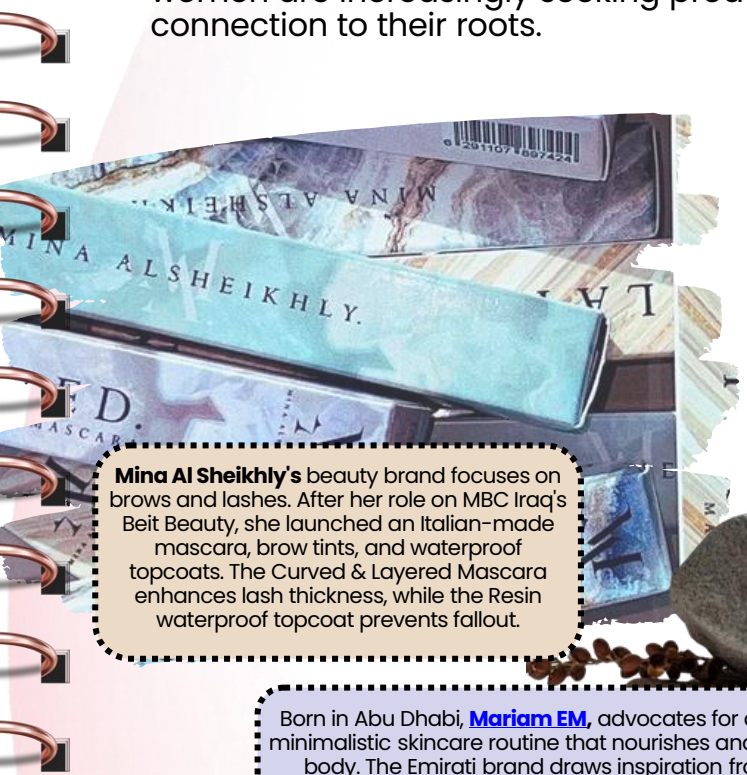
The importance of Fragrance lingers on

Trend 1

A-Beauty takes centerstage

A-Beauty (Arab Beauty) is redefining beauty standards in the Middle East, moving away from Western ideals to embrace traditional features like **full lips, thick brows,** and **prominent cheekbones**. This shift is not just aesthetic but a **celebration of cultural identity**, empowering women to take pride in their natural traits.

Inspired by J-Beauty and K-Beauty, A-Beauty highlights local ingredients and centuries-old traditions, offering products that enhance Middle Eastern beauty. Arab women are increasingly seeking products that reflect their heritage, signaling a deeper connection to their roots.



Mina Al Sheikhly's beauty brand focuses on brows and lashes. After her role on MBC Iraq's Beit Beauty, she launched an Italian-made mascara, brow tints, and waterproof topcoats. The Curved & Layered Mascara enhances lash thickness, while the Resin waterproof topcoat prevents fallout.

Huda Beauty (UAE): Founded by Huda Kattan, a global icon of Arab beauty, Huda Beauty creates products tailored to Middle Eastern women, celebrating authentic beauty.

Born in Abu Dhabi, **Mariam EM,** advocates for a natural and minimalistic skincare routine that nourishes and pampers the body. The Emirati brand draws inspiration from the rich Arabic culture, introducing the healing properties of the Sidr tree to the beauty world.

Asteri Beauty, a growing name in A-Beauty from Saudi Arabia, merges modern formulations with local ingredients like oud and rose water, essential to Arab beauty traditions. The brand reflects Middle Eastern aesthetics, enhancing natural features and cultural identity.

Trend 2

The quest for everlasting youth

In the Middle East, the pursuit of youth **blends ancient traditions** with **modern innovations**. Consumers rely on age-old remedies like argan oil and rose water while embracing **biohacking technologies**, from cryotherapy and **laser therapies** to fitness trackers and **nootropics**, to maintain youthful looks and optimize health.

The region's affluence fuels demand for **premium anti-aging treatments**, with **wellness retreats, non-invasive procedures,** and clean eating becoming integral to the approach. More than ever, beauty is seen as a reflection of inner health, with consumers seeking both external treatments and holistic well-being.

Obagi Medispa (KSA & UAE): renowned for offering advanced laser therapies such as fractional CO2 lasers, laser skin resurfacing, and laser hair removal. These therapies help clients achieve a youthful glow with minimal downtime.

Maison Lutetia (KSA & UAE): is a top choice for dermal fillers and botox, offering clients non-invasive facial enhancements that maintain youthful contours and reduce wrinkles.

Cryo Health, based in Dubai, provides a range of cryotherapy treatments aimed at anti-aging, weight loss, and muscle recovery. Clients use localized cryotherapy for specific areas, as well as full-body treatments for overall wellness and beauty benefits.

Chilling Out with Biohackn Ice Baths: Your Ultimate Recovery Solution in Dubai

Trend 3

Blending ancient practices with modern lifestyle

Middle Eastern consumers are embracing a harmonious blend of **age-old practices** and **modern innovations**, integrating traditional rituals into their contemporary lives. From using **indigenous ingredients** in everyday cooking to adopting **natural products** in skincare, this fusion reflects a growing focus on **holistic beauty** that nurtures both the inside and out.

Ancient remedies like **hammams (steam baths)** and **ghassoul clay masks** are finding their place in modern wellness routines, often featured in spa treatments across the region. The rise of wellness retreats that incorporate these traditional therapies highlights the region's commitment to balancing tradition and innovation.

L'Occitane Arabia (Middle East): Combines argan oil and almond from the region with advanced skincare science to offer a fusion of tradition and modern beauty in its product line.

Shiffa Dubai Skincare combines ancient Middle Eastern beauty secrets with modern skincare science. Using ingredients like frankincense, rose water, and henna, Shiffa's products are designed to enhance natural beauty while tapping into traditional remedies.

Rediscovering Time-Honoured Traditions: The Resurgence of Hammam Rituals in Saudi Arabia

The Ritual of Hammam collection draws from ancient cleansing traditions, providing a modern at-home spa experience with over 90% natural-origin ingredients, including eucalyptus and argan oil. Indulge in this purifying routine to unwind and settle.

Trend 4

Fusion of local and global influences

Middle Eastern consumers are embracing **fusion lifestyles**, seamlessly merging their rich local traditions with global trends. With **social media and technology** driving this **cultural exchange**, consumers are blending **global innovations** with **Middle Eastern heritage**, creating a dynamic and unique lifestyle.

In the beauty industry, this fusion is especially visible, where consumers **skillfully incorporate global beauty trends** with traditional **Middle Eastern practices**. From skincare to fashion, this cultural blend is reshaping the region's beauty landscape, offering a fresh take on both tradition and modernity.

L'Oreal brings a fusion of global skincare advancements combined with products tailored for Middle Eastern consumers, such as sunscreen formulas that cater to the region's intense sun exposure, reflecting a perfect blend of global innovation with local needs

Brands like **Herbivore Botanicals**, which emphasize natural ingredients and sustainable packaging, are gaining traction among environmentally conscious consumers in the GCC.

Fenty Beauty, a global brand by Rihanna, has gained immense popularity in the Middle East for its inclusive beauty approach. Middle Eastern consumers gravitate toward Fenty's wide range of foundation shades that complement Arab skin tones while reflecting international beauty trends.

Brands like **Amouage**, which blends traditional Middle Eastern ingredients with modern perfumery techniques, exemplify this trend. Amouage has successfully positioned itself as a luxury brand that resonates with both local and international consumers.

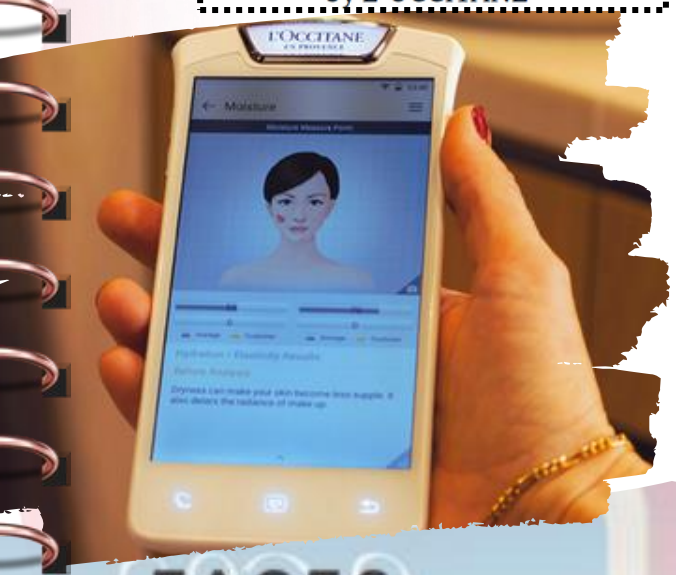
Trend 5

Personalization is the norm

Personalized skincare and beauty solutions are gaining widespread popularity as consumers seek **products tailored to their unique skin concerns.** The demand for **customized beauty regimes** is driven by the desire for products that address individual skin types, climate conditions, and lifestyle needs, reflecting a shift toward **personalized beauty experiences.**

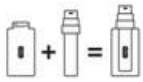
Many beauty brands are embracing **AI-driven virtual consultations** to offer personalized product recommendations, allowing consumers to build customized beauty routines from the comfort of their homes.

The Skin Analysis Device
by L'OCCITANE



CLINIQUE

Clinique iD - Dramatically Different Hydrating Clearing Jelly + Cartridge



Create your custom-blend hydrator.

Hydrate + treat.
15 combinations.

LEARN MORE

FACES

Faces and Revieve Partner to Launch the First Digital Skincare Experience for Customers in the Middle East

FIND THE
RIGHT PRODUCT
FOR YOUR SKIN

Trend 6

Spotlight on Clean & Conscious Beauty

Consumers in the Middle East are increasingly turning to **organic**, **cruelty-free**, and **sustainable beauty products** as part of a global shift toward **clean and ethical consumption.** With growing awareness around the impact of harmful chemicals and unsustainable practices, the demand for eco-friendly, natural ingredients is rising, driving the growth of **the clean beauty industry, projected to reach $2.6 billion by 2025.**

Brands like **Secret Skin** are leading the clean beauty movement in the region by promoting **toxin-free, sustainable beauty solutions** and fostering mindful consumption. As consumers seek out brands that prioritize transparency and sustainability, the clean beauty trend is shaping the future of beauty in the Middle East.

With a commitment to organic ingredients, sustainable packaging, and cruelty-free practices, **L'Araboutique** is more than just a skincare brand. It is a statement of respect and reverence for ourselves, our communities, and the planet we call home.

Saanté Selfcare takes a holistic approach to beauty, rooted in Aromatherapy, Reiki and the 5000-year-old science of life, Ayurveda. Our products are aligned with the philosophy that selfcare is about embracing a way of life that respects inner growth that is the result of physical and mental wellbeing.

MZN Bodycare is a Saudi brand centered on creating Skin and Body care products that are natural vegan, cruelty free for the everyday consumer.

Formulated and Developed Exclusively for the Gulf Region: GLIST was masterminded to pioneer an essential step in East Asian skincare to the GCC market. That makes us the first premium, clean East Asian skincare brand in the Gulf.

Trend 7

Men – an important audience too

The modern **Middle Eastern man, is embracing a sense of comfort** when it comes to sharing and **indulging in beauty** and **personal care experiences that transcend conventional grooming boundaries.**

This is evidenced by an emergence of beauty videos produced and published by **Arab male creators on YouTube**. Social media is playing a key role in promoting male grooming trends. Influencers and beauty bloggers are driving a**wareness of grooming routines, skincare tips, and the latest beauty products, encouraging more men to invest in their grooming and personal care.**

Men's practical interest in grooming is climbing too. **Grooming-related search queries** in the UAE and Saudi Arabia **hit around 50M in 2022, marking a 29% rise between 2019 and 2022.**

The Grooming Lab CEO Zein Arbeed Is Ushering Modern Day Masculinity Into The MENA Region With Her Enterprise. The Grooming Lab, launched in 2017 by Zein Arbeed, was born out of this gradual breakage in social constructs.The Dubai-based distributing platform offers skincare, shaving, hairstyling, and haircare items for men.

Trend 8

Fragrance continues to hold its importance

Fragrance holds a deeply significant role in beauty in the Middle East. Fragrance has been **an integral part of Middle Eastern culture for centuries e.g. the use of oud (agarwood), frankincense, and musk in personal care.**

Fragrance is seen as an extension of one's identity. Perfume layering, a unique cultural practice, allows individuals to create **personalized scents by combining different perfumes, oils, and sprays.** This custom not only enhances their personal style but also offers a sense of uniqueness and self-expression.

In the Middle East, **fragrance is more than just a beauty product**—it's a cultural emblem, a tool for personal expression, and a luxury statement.

Rassasi is a well-known UAE perfume brand recognized for its quality and value in the global market. It offers a variety of scents that blend traditional Arabic and contemporary Western fragrances, appealing to a wide international audience while ensuring innovative quality at affordable prices.

Amouage is a prestigious Omani luxury perfume house celebrated for its extravagant and unique scents, reflecting Middle Eastern culture. Known for their complexity and longevity, Amouage perfumes blend rare and exotic notes, appealing to those who appreciate premium fragrances with distinctive stories.

Swiss Arabian is a leading perfume company in the UAE, trusted for its unique oils that reflect Middle Eastern spirit. Combining traditional Arabian methods with modern innovations, it offers a diverse range from oud-style to fresh scents. Its quality and availability are valued in Arabian Peninsula culture.

Mind-the-Gap

Here is a snapshot of the generational mindsets to help better connect with them...

BABY BOOMERS
(1946 - 1964)

AGING GRACEFULLY | HIGH QUALITY PRODUCTS | HERITAGE & TRADITION

Baby Boomers favor traditional beauty standards, focusing on aging gracefully with an emphasis on skincare rather than bold makeup. They value high-end, luxury products, show loyalty to established brands, and often tie beauty to cultural heritage and traditional practices.

ANTI-AGING | CULTURAL SENSITIVITY | CLASSIC BEAUTY

Generation X values a classic, professional appearance, often investing in anti-aging treatments and high-end skincare to maintain youthful skin. They commonly seek plastic surgery and cosmetic enhancements while balancing traditional beauty ideals with global standards.

GEN X
(1965 - 1980)

GEN Y
(1981 - 1996)

BALANCED BEAUTY | SOCIAL MEDIA INFLUENCE | ETHICAL CHOICES

Millennials, influenced by global exposure and social media, are shaped by international beauty trends. They draw inspiration from influencers and celebrities, favoring natural beauty that enhances rather than alters features. Additionally, they prioritize brands that emphasize sustainability, cruelty-free production, and transparency.

SELF EXPRESSION | BODY POSITIVITY | MINIMALISM

For Gen Z, beauty is about expressing one's individuality. They are more experimental with makeup, hairstyles, and fashion, embracing bold, creative looks while challenging traditional norms. They champion body positivity & inclusivity, rejecting conventional beauty standards. TikTok and Instagram are key influences in promoting these values. In addition to experimenting with makeup, they are particularly focused on skincare and self-care, influenced by global wellness trends.

GEN Z
(1997 - 2012)

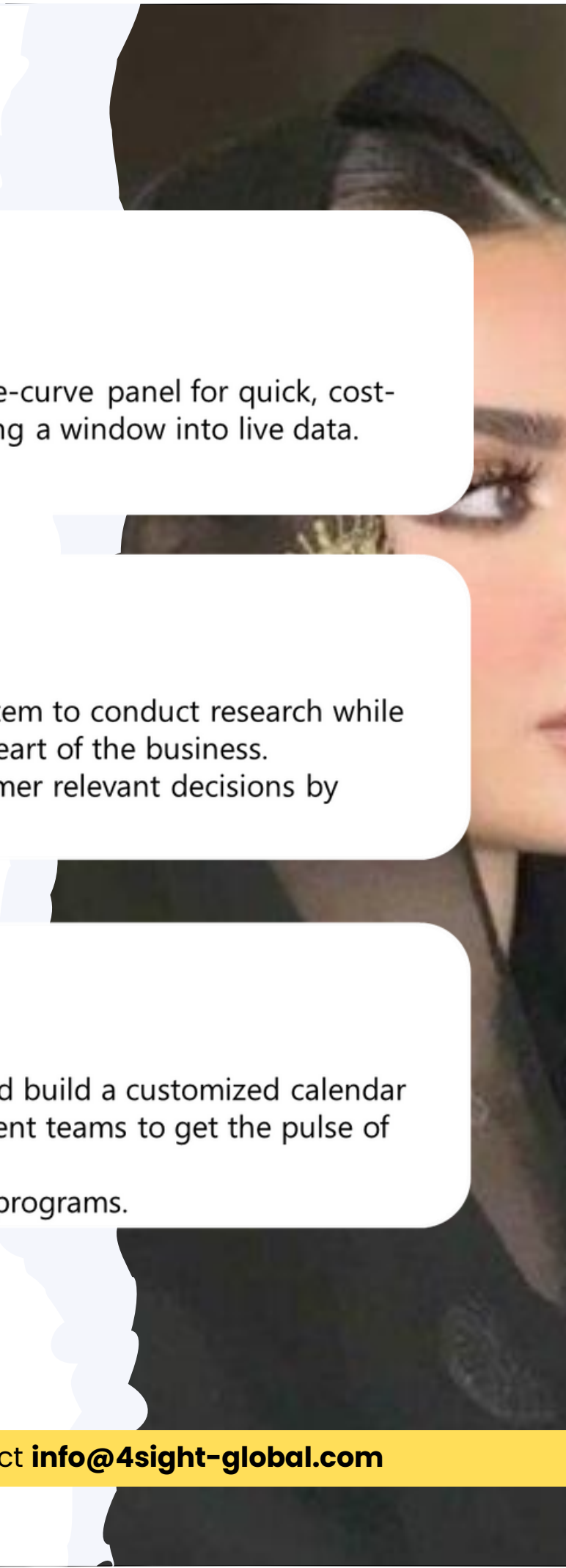
GEN ALPHA
(2012 onwards)

DIGITAL INFLUENCES | INCLUSIVITY | ECO-CONSCIOUSNESS

Gen Alpha is growing up in a digital environment where beauty is influenced by AR filters and avatars. Their understanding of beauty is fluid and experimental, embracing diversity in skin tones, body types, and styles. This generation expects brands to offer personalized beauty products and is inclined towards eco-friendly and cruelty-free options due to their focus on environmental sustainability.

OUR

4SiGHT Live Suite



PANEL UAE | KSA

Our pre-recruited ahead-of-the-curve panel for quick, cost-efficient research needs, offering a window into live data.

COMMUNITIES

Designed to build an agile system to conduct research while keeping the customer at the heart of the business.
Enables clients to make consumer relevant decisions by testing on the go.

CONSUMER CONNECTS

4SiGHT's solution to curate and build a customized calendar of immersive interviews for client teams to get the pulse of the consumer.
Available as ad-hoc & annual programs.

For more information, contact **info@4sight-global.com**

OUR

Research Tools

INSIGHT EXPRESS

Enables swift and efficient innovation testing, minimizing the risks linked to a comprehensive launch - allowing you explore, experiment, and fail cheap.

AASMA | CHATBOT

Facilitates interactive conversations with consumers, streamlining the process of filling consumption/usage diaries. Leading to improved efficiency and quality of data collection.

SPRINT

Provides an innovative boost to your iterative process by making it more AGILE through co-creation workshops, giving wings to potential ideas/improvements

For more information, contact **info@4sight-global.com**

OUR

Calendar

JANUARY

TRENDS SHAPING OUR REGION

FEBRUARY

RAMADAN IN THE POST PANDEMIC ERA

MARCH

EVOLVING LANDSCAPE OF LEISURE & ENTERTAINMENT

APRIL

CHANGING FACE OF CUSTOMER EXPERIENCE

MAY

EVOLVING RETAIL LANDSCAPE

JUNE

THE THRIVING GAMING INDUSTRY

JULY

EVOLVING CODES OF LUXURY

AUGUST

HEALTH, WELLNESS & SPORTS

SEPTEMBER

THE EVOLVING FACE OF BEAUTY – PART 1

OCTOBER (COMING NEXT)

THE EVOLVING FACE OF BEAUTY – PART 2

NOVEMBER

COMING SOON

DECEMBER

COMING SOON