

Beauty and Personal Care in Uruguay

Market Direction | 2024-04-30 | 110 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €2200.00
- Multiple User License (1 Site) €4400.00
- Multiple User License (Global) €6600.00

Report description:

2023 saw Uruguay's beauty and personal care industry face declining volume sales as cross-border shopping and the informal trade in parallel imports and contraband smuggled in from Argentina continues to erode demand for products distributed through official retail channels. The impact of this is seen most clearly in deodorants, bath and shower, hair care, men's grooming, and oral care, all of which experienced drops in volume sales during 2023, including double-digit volume declines in some. Th...

Euromonitor International's Beauty and Personal Care in Uruguay report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2019-2023, allowing you to identify the sectors driving growth. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Baby and Child-specific Products, Bath and Shower, Colour Cosmetics, Deodorants, Depilatories, Dermocosmetics Beauty and Personal Care, Fragrances, Hair Care, Mass Beauty and Personal Care, Men's Grooming, Oral Care, Oral Care Excl Power Toothbrushes, Premium Beauty and Personal Care, Prestige Beauty and Personal Care, Skin Care, Sun Care.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Beauty and Personal Care market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Beauty and Personal Care in Uruguay
Euromonitor International
April 2024

List Of Contents And Tables

BEAUTY AND PERSONAL CARE IN URUGUAY

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

APPENDIX

DISCLAIMER

SOURCES

Summary 1 Research Sources

MASS BEAUTY AND PERSONAL CARE IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales contract across key mass beauty and personal care categories
Huge growth in sales of mass brands with dermo positioning in skin care and sun care
Solid volume growth for mass colour cosmetics as pre-pandemic lifestyles return

PROSPECTS AND OPPORTUNITIES

Opportunities for mass dermocosmetic brands to grow after years of robust growth
The distribution of mass brands to focus on beauty specialists and omnichannel retailing
Pharmacies set to remain the most important distribution channel for mass brands

CATEGORY DATA

Table 11 Sales of Mass Beauty and Personal Care by Category: Value 2018-2023
Table 12 Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023
Table 13 NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023
Table 14 LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023
Table 15 Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028
Table 16 Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2023-2028

PREMIUM BEAUTY AND PERSONAL CARE IN URUGUAY

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium beauty and personal care continues to grow in volume and value terms

E-commerce emerges strongly as a useful tool to attract the attention of consumers

L'Oréal is the leading premium player due to its advantageous position in pharmacies

PROSPECTS AND OPPORTUNITIES

New omnichannel distribution strategies to influence the category's development

Social media an increasingly vital tool for boosting sales growth for premium brands

Premium brands set to continue sharpening their focus on high quality and sustainability

CATEGORY DATA

Table 17 Sales of Premium Beauty and Personal Care by Category: Value 2018-2023

Table 18 Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 19 NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023

Table 20 LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023

Table 21 Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028

Table 22 Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

BABY AND CHILD-SPECIFIC PRODUCTS IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cross-border shopping results in falling volume sales and muted value growth

Pharmacies consolidates its leadership in the retailing of baby and child-specific products

Johnson & Johnson leads sales due to wide distribution and competitive pricing

PROSPECTS AND OPPORTUNITIES

Demand for more natural products set to continue rising during the forecast period

Opportunities for emerging brands as price increasingly influences purchasing decisions

Uruguay's low birth rate could pose a threat to category growth

CATEGORY DATA

Table 23 Sales of Baby and Child-specific Products by Category: Value 2018-2023

Table 24 Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023

Table 25 Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023

Table 26 NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023

Table 27 LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023

Table 28 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

Table 29 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

Table 30 Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028

Table 31 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

Table 32 □Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

BATH AND SHOWER IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bath and shower sees a contraction in volume and current value sales

Products with natural ingredients continue to gain ground in bath and shower

Unilever and Colgate-Palmolive retain their strong leadership via wide distribution

PROSPECTS AND OPPORTUNITIES

Innovation and differentiation key elements for ongoing sales growth in bath and shower

Supermarkets set to remain the most important distribution channel for bath and shower

E-commerce set to emerge as a major new distribution channel in bath and shower

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

CATEGORY DATA

Table 33 Sales of Bath and Shower by Category: Value 2018-2023

Table 34 Sales of Bath and Shower by Category: % Value Growth 2018-2023

Table 35 Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023

Table 36 NBO Company Shares of Bath and Shower: % Value 2019-2023

Table 37 LBN Brand Shares of Bath and Shower: % Value 2020-2023

Table 38 LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023

Table 39 Forecast Sales of Bath and Shower by Category: Value 2023-2028

Table 40 Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028

Table 41 Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

COLOUR COSMETICS IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Another year of positive volume growth for colour cosmetics

L'Oreal benefits from the launch of its new product Revitalift Retinol

Pharmacies consolidates its leading position as direct selling loses ground

PROSPECTS AND OPPORTUNITIES

Direct sellers to modify their sales strategies to recover ground lost to the informal trade

Innovation, sustainability, and promotions to remains key spurs on sales growth

Social media set to become a more important tool for the marketing of colour cosmetics

CATEGORY DATA

Table 42 Sales of Colour Cosmetics by Category: Value 2018-2023

Table 43 Sales of Colour Cosmetics by Category: % Value Growth 2018-2023

Table 44 Sales of Colour Cosmetics by Premium vs Mass: % Value 2018-2023

Table 45 NBO Company Shares of Colour Cosmetics: % Value 2019-2023

Table 46 LBN Brand Shares of Colour Cosmetics: % Value 2020-2023

Table 47 LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023

Table 48 Forecast Sales of Colour Cosmetics by Category: Value 2023-2028

Table 49 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

Table 50 Forecast Sales of Colour Cosmetics by Premium vs Mass: % Value 2023-2028

DEODORANTS IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales of deodorants continue to fall due to competition from cross-border trade

The popularity of natural and organic deodorants continues to grow

Unilever confirms its dominant leadership in deodorants

PROSPECTS AND OPPORTUNITIES

Price promotions to prove crucial as deodorants faces challenges from the cross-border trade

The appeal of more natural and sustainable products set to continue growing

Economic stability in Argentina to curb influence of cross-border shopping and informal trade

CATEGORY DATA

Table 51 Sales of Deodorants by Category: Value 2018-2023

Table 52 Sales of Deodorants by Category: % Value Growth 2018-2023

Table 53 Sales of Deodorants by Premium vs Mass: % Value 2018-2023

Table 54 NBO Company Shares of Deodorants: % Value 2019-2023

Table 55 LBN Brand Shares of Deodorants: % Value 2020-2023

Table 56 LBN Brand Shares of Premium Deodorants: % Value 2020-2023

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 57 Forecast Sales of Deodorants by Category: Value 2023-2028

Table 58 Forecast Sales of Deodorants by Category: % Value Growth 2023-2028

Table 59 Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

DEPILATORIES IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for depilatories falls for the third consecutive year due to cross-border activity

Leading brands continue to focus on added value and benefits such as ease of use

Sebamar SA, Carrau & Cia and Karinda Ltda lead sales by representing global brands

PROSPECTS AND OPPORTUNITIES

Pharmacies set to extend its lead and remain the preferred retail channel for depilatories

Emergence of e-commerce presents opportunities to boost demand for depilatories

More targeted products set to drive sales growth in hair removers/bleaches

CATEGORY DATA

Table 60 Sales of Depilatories by Category: Value 2018-2023

Table 61 Sales of Depilatories by Category: % Value Growth 2018-2023

Table 62 NBO Company Shares of Depilatories: % Value 2019-2023

Table 63 LBN Brand Shares of Depilatories: % Value 2020-2023

Table 64 Forecast Sales of Depilatories by Category: Value 2023-2028

Table 65 Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

FRAGRANCES IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for fragrances continues to rise due to less influence from cross-border trade

The retail distribution of fragrances expands throughout Uruguay as e-commerce booms

L'Oreal is strong in premium fragrances, while direct seller Natura is strong in the mass segment

PROSPECTS AND OPPORTUNITIES

Rising demand for premium fragrances to underpin positive volume and value growth

Omnichannel strategies set to become a more important driver of growth in fragrances

Promotional strategies are set to continue developing strongly to attract consumers

CATEGORY DATA

Table 66 Sales of Fragrances by Category: Value 2018-2023

Table 67 Sales of Fragrances by Category: % Value Growth 2018-2023

Table 68 NBO Company Shares of Fragrances: % Value 2019-2023

Table 69 LBN Brand Shares of Fragrances: % Value 2020-2023

Table 70 LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023

Table 71 LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

Table 72 Forecast Sales of Fragrances by Category: Value 2023-2028

Table 73 Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

HAIR CARE IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hair care experiences a significant contraction in demand as cross-border sales bite

Garnier Fructis launches new line of vegan shampoos in response to evolving demand

Global names L'Oreal, Procter & Gamble and Unilever dominate sales in hair care

PROSPECTS AND OPPORTUNITIES

Dermocosmetic brands exhibit particularly strong growth potential

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The incorporation of skin care attributes in hair care products to gain further ground
The focus on quality over quantity is set to continue defining hair care

CATEGORY DATA

Table 74 Sales of Hair Care by Category: Value 2018-2023

Table 75 Sales of Hair Care by Category: % Value Growth 2018-2023

Table 76 Sales of Hair Care by Premium vs Mass: % Value 2018-2023

Table 77 NBO Company Shares of Hair Care: % Value 2019-2023

Table 78 LBN Brand Shares of Hair Care: % Value 2020-2023

Table 79 NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023

Table 80 LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023

Table 81 LBN Brand Shares of Premium Hair Care: % Value 2020-2023

Table 82 Forecast Sales of Hair Care by Category: Value 2023-2028

Table 83 □Forecast Sales of Hair Care by Category: % Value Growth 2023-2028

Table 84 □Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

MEN'S GROOMING IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men's fragrances bucks negative general sales trend by registering strong sales growth

Men's toiletries sees significant volume sales contraction due to cross-border trade

Sebamar remains dominant in men's shaving via its representation of the Gillette brand

PROSPECTS AND OPPORTUNITIES

Opportunity for emerging brands to gain space in a more segmented category

Social media to become a more important tool for attracting and influencing consumers

Pharmacies set to remain the most relevant distribution channel for men's grooming

CATEGORY DATA

Table 85 Sales of Men's Grooming by Category: Value 2018-2023

Table 86 Sales of Men's Grooming by Category: % Value Growth 2018-2023

Table 87 Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023

Table 88 Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023

Table 89 NBO Company Shares of Men's Grooming: % Value 2019-2023

Table 90 LBN Brand Shares of Men's Grooming: % Value 2020-2023

Table 91 LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023

Table 92 Forecast Sales of Men's Grooming by Category: Value 2023-2028

Table 93 Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

ORAL CARE IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for oral care continues to contract due to the cross-border trade

Consumers seek out more effective toothpaste brands with specific ingredients

Colgate-Palmolive maintains its lead thanks to its reputation for innovation and prestige

PROSPECTS AND OPPORTUNITIES

Organic products and those with natural ingredients set to continue attracting consumers

Promotions and discounts to be key planks of efforts to combat the cross-border trade

Supermarkets to remain the leading retail channel for oral care, followed by pharmacies

CATEGORY DATA

Table 94 Sales of Oral Care by Category: Value 2018-2023

Table 95 Sales of Oral Care by Category: % Value Growth 2018-2023

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 96 Sales of Toothbrushes by Category: Value 2018-2023
 Table 97 Sales of Toothbrushes by Category: % Value Growth 2018-2023
 Table 98 Sales of Toothpaste by Type: % Value Breakdown 2019-2023
 Table 99 NBO Company Shares of Oral Care: % Value 2019-2023
 Table 100 LBN Brand Shares of Oral Care: % Value 2020-2023
 Table 101 Forecast Sales of Oral Care by Category: Value 2023-2028
 Table 102 Forecast Sales of Oral Care by Category: % Value Growth 2023-2028
 Table 103 □Forecast Sales of Toothbrushes by Category: Value 2023-2028
 Table 104 □Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

SKIN CARE IN URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive volume and value growth supported by rising demand for premium brands
 Skin care products with a dermocosmetic positioning continue to gain ground
 L'Oreal further extends its lead in skin care as it capitalises on the dermocosmetics trend

PROSPECTS AND OPPORTUNITIES

The importance of pharmacies for sales of skin care set to continue increasing
 Brands will have to work harder to attract the attention of increasingly sophisticated consumers
 E-Commerce and the omnichannel approach set to offer distinct advantages

CATEGORY DATA

Table 105 Sales of Skin Care by Category: Value 2018-2023
 Table 106 Sales of Skin Care by Category: % Value Growth 2018-2023
 Table 107 NBO Company Shares of Skin Care: % Value 2019-2023
 Table 108 LBN Brand Shares of Skin 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 URUGUAY

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sun care continues to recover despite major slowdown in volume growth
 Preference for premium products drives value growth in sun care
 Urufarma leads sales in sun care, closely followed by L'Oreal Groupe

PROSPECTS AND OPPORTUNITIES

The trend towards more natural and sustainable products set to continue building
 Sales of sun care products with a dermocosmetic positioning set to continue growing
 Pharmacies set to continue emerging as an important distribution channel for sun care

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 Sales of Sun Care by Premium vs Mass: % Value 2018-2023
 Table 115 NBO Company Shares of Sun Care: % Value 2019-2023
 Table 116 LBN Brand Shares of Sun Care: % Value 2020-2023
 Table 117 LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023
 Table 118 Forecast Sales of Sun Care by Category: Value 2023-2028
 Table 119 Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Beauty and Personal Care in Uruguay

Market Direction | 2024-04-30 | 110 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€2200.00
	Multiple User License (1 Site)	€4400.00
	Multiple User License (Global)	€6600.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-09"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com