

Beauty and Personal Care in Brazil

Market Direction | 2024-07-23 | 178 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €2675.00
- Multiple User License (1 Site) €5350.00
- Multiple User License (Global) €8025.00

Report description:

In 2023, Brazil returned to the ranks of the world's 10 largest economies, rising from 11th to ninth place. This renewed dynamism in the global economic landscape was also reflected in the beauty and personal care industry. After a prolonged period in fourth place, Brazil overtook Japan to reclaim third position in the global beauty and personal care rankings in 2023. The double-digit current value growth for beauty and personal care in Brazil in 2023 reflects a more favourable macroeconomic env...

Euromonitor International's Beauty and Personal Care in Brazil 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 Brazil

Euromonitor International

July 2024

List Of Contents And Tables

BEAUTY AND PERSONAL CARE IN BRAZIL

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

DISCLAIMER

SOURCES

Summary 1 Research Sources

MASS BEAUTY AND PERSONAL CARE IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mass segment narrows growth gap with premium segment in 2023

Mass personal care categories rebound, surpassing performance of mass beauty categories, while Brazil has a mature market for sustainable products

WhatsApp consolidates as an important tool for online sales of mass products

PROSPECTS AND OPPORTUNITIES

Mass segment expected to remain dominant in Brazil despite maturity, with several categories holding significant potential for growth

Consumers anticipated to blend the use of premium and mass products, seeking higher quality as incomes rise

Omnichannel should continue to be an important driver of growth

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

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

PREMIUM BEAUTY AND PERSONAL CARE IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium segment sees double-digit growth, but slows compared with previous years; "duples" limit growth in fragrances, while the heat boosts sun protection

Colour cosmetics regains momentum, while skin care continues to hold its place as a promising category in Brazil

Key drivers of growth in retail e-commerce in the premium segment in Brazil are free shipping, expanded consumer base, and easy repurchasing

PROSPECTS AND OPPORTUNITIES

Growth of premium beauty and personal care potentially influenced by climate change and macroeconomic indicators

Proven efficacy and benefits are poised to become pivotal factors driving the future success of premium beauty and personal care in Brazil

Rising retail channels: The growing role of pharmacies and shopping centres in premium skin care in Brazil

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 BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Baby and child-specific sun care gains momentum in 2023

The importance of hair care in Brazil is reflected in the launch of baby and child-specific hair care products

Pharmacy shelves reflect the rise of premium brands, while direct selling giant Grupo Boticario makes strides in baby and child-specific products

PROSPECTS AND OPPORTUNITIES

Postponed motherhood paves the way for discerning shoppers poised to reshape the brand preference landscape

Children's interest in skin care products causes concern

Nostalgia and immersive in-store experiences should stimulate a return to shopping in bricks-and-mortar spaces

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 Skin Care: % Value 2020-2023

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

Table 30 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

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

Table 32 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

Table 33 Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

BATH AND SHOWER IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Heatwaves and gift items boost demand for bar soap

Despite weak growth in other bath and shower categories, demand for dermocosmetics remains a bright spot
Premiumisation drives growth in retail e-commerce, although supermarkets and direct selling continue to dominate bath and shower

PROSPECTS AND OPPORTUNITIES

Bath and shower poised for growth, defying category maturity
Rising demand for female-focused products, driven by the growing female population
The future of consumer channels: Shaping post-pandemic shopping trends

CATEGORY DATA

Table 34 Sales of Bath and Shower by Category: Value 2018-2023
Table 35 Sales of Bath and Shower by Category: % Value Growth 2018-2023
Table 36 Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023
Table 37 NBO Company Shares of Bath and Shower: % Value 2019-2023
Table 38 LBN Brand Shares of Bath and Shower: % Value 2020-2023
Table 39 LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023
Table 40 Forecast Sales of Bath and Shower by Category: Value 2023-2028
Table 41 Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028
Table 42 Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

COLOUR COSMETICS IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lip products are the highlight of growth in colour cosmetics in Brazil
After the launch boom, the era of influencer brand consolidation begins
Colour cosmetics has the worst retail e-commerce performance within beauty and personal care

PROSPECTS AND OPPORTUNITIES

Despite the influx of budget options, the future of colour cosmetics looks promising, although women's incomes will continue to limit sales

Loyalty is the ultimate challenge, while tween beauty expands amidst concerns
Change in the geographical concentration of the Brazilian population could favour fragmentation in the forecast period

CATEGORY DATA

Table 43 Sales of Colour Cosmetics by Category: Value 2018-2023
Table 44 Sales of Colour Cosmetics by Category: % Value Growth 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 Eye Make-up: % Value 2020-2023
Table 48 LBN Brand Shares of Facial Make-up: % Value 2020-2023
Table 49 LBN Brand Shares of Lip Products: % Value 2020-2023
Table 50 LBN Brand Shares of Nail Products: % Value 2020-2023
Table 51 LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023
Table 52 Forecast Sales of Colour Cosmetics by Category: Value 2023-2028
Table 53 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

DEODORANTS IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising temperatures and new usage occasions drive double-digit value growth for deodorants
Body splashes and newcomers shake up the deodorants category
Premiumisation process opens up space for retail e-commerce to advance

PROSPECTS AND OPPORTUNITIES

Deodorant sprays expected to remain the main format in the market, although deodorant sticks and pumps set to advance at a faster pace

Synergy with a healthy lifestyle and the practice of sports will continue to boost sales of deodorants

New brands and products will drive e-commerce growth, but pharmacies and grocery retailers will continue to account for the highest shares of sales

CATEGORY DATA

Table 54 Sales of Deodorants by Category: Value 2018-2023

Table 55 Sales of Deodorants by Category: % Value Growth 2018-2023

Table 56 Sales of Deodorants by Premium vs Mass: % Value 2018-2023

Table 57 NBO Company Shares of Deodorants: % Value 2019-2023

Table 58 LBN Brand Shares of Deodorants: % Value 2020-2023

Table 59 LBN Brand Shares of Premium Deodorants: % Value 2020-2023

Table 60 Forecast Sales of Deodorants by Category: Value 2023-2028

Table 61 Forecast Sales of Deodorants by Category: % Value Growth 2023-2028

Table 62 Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

DEPILATORIES IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tourism resurgence fuels growth for depilatories, but the revival of beauty salons carves out its share of hair removal

Demand for more natural compositions is growing in a market still marked by concentration and controversy

The "premium shower" brings opportunities to the mature depilatories category in Brazil

PROSPECTS AND OPPORTUNITIES

Media coverage of risks of laser hair removal impacts depilatories forecast, but challenges persist due to maturity and competition from salons

Loyalty is already a reality in depilatories in Brazil, and attempts to expand continue through complementary products to the hair removal routine

Population ageing may bring about both volume reduction and a shift towards premiumisation

CATEGORY DATA

Table 63 Sales of Depilatories by Category: Value 2018-2023

Table 64 Sales of Depilatories by Category: % Value Growth 2018-2023

Table 65 Sales of Women's Razors and Blades by Type: % Value Breakdown 2019-2023

Table 66 NBO Company Shares of Depilatories: % Value 2019-2023

Table 67 LBN Brand Shares of Depilatories: % Value 2020-2023

Table 68 Forecast Sales of Depilatories by Category: Value 2023-2028

Table 69 Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

FRAGRANCES IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fragrances thrives amidst double-digit value growth, while "dupe culture" emerges as a strategy to mitigate price increases

Rising temperatures act as a driver for the substitution effect from fragrances to body splashes

Slowdown in premium demand impacts retail e-commerce growth, while direct selling remains the main distribution channel

PROSPECTS AND OPPORTUNITIES

Luxury within luxury, and niche fragrances point to a new stage in the polarisation of consumption

A new gender divide could also impact demand trends

Changes in population composition may influence the future of retail channels for fragrances

CATEGORY DATA

Table 70 Sales of Fragrances by Category: Value 2018-2023

Table 71 Sales of Fragrances by Category: % Value Growth 2018-2023

Table 72 NBO Company Shares of Fragrances: % Value 2019-2023

Table 73 LBN Brand Shares of Fragrances: % Value 2020-2023

Table 74 LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023

Table 75 LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

Table 76 Forecast Sales of Fragrances by Category: Value 2023-2028

Table 77 Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

HAIR CARE IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Heat, sports, and ingredient-led beauty are key growth drivers for shampoos, and conditioners and treatments

Freedom in hair care fosters fertile ground for innovation and addressing specific needs

Retail e-commerce loses momentum against bricks-and-mortar outlets in 2023

PROSPECTS AND OPPORTUNITIES

Styling agents set to be a growth highlight in hair care in the forecast period

The growing influence of Latin America, and the potential to expand Brazil's hair care expertise globally

Unlocking potential: The evolution of hair care trends through men's hair transplants

CATEGORY DATA

Table 78 Sales of Hair Care by Category: Value 2018-2023

Table 79 Sales of Hair Care by Category: % Value Growth 2018-2023

Table 80 Sales of Hair Care by Premium vs Mass: % Value 2018-2023

Table 81 NBO Company Shares of Hair Care: % Value 2019-2023

Table 82 NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023

Table 83 LBN Brand Shares of Hair Care: % Value 2020-2023

Table 84 LBN Brand Shares of Colourants: % Value 2020-2023

Table 85 LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023

Table 86 LBN Brand Shares of Styling Agents: % Value 2020-2023

Table 87 LBN Brand Shares of Premium Hair Care: % Value 2020-2023

Table 88 Forecast Sales of Hair Care by Category: Value 2023-2028

Table 89 Forecast Sales of Hair Care by Category: % Value Growth 2023-2028

Table 90 Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

MEN'S GROOMING IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Brazilian men are becoming more active shoppers in a category still dominated by fragrances

Hygiene categories benefit from activities outside the home post COVID-19, and sport remains a key medium for connecting with consumers

Retail e-commerce stabilises at a much higher level of sales than pre-pandemic, but direct selling is the highlight of 2023

PROSPECTS AND OPPORTUNITIES

Efficiently meeting specific needs boosts demand for beauty products, and the weather set to drive interest in hygiene products

The Brazilian market has not yet explored holistic health and wellness as an effective strategy to attract men

International travel likely to continue to be an obstacle to growth in premium men's grooming, while in the mass segment competition for wallet share will continue

CATEGORY DATA

Table 91 Sales of Men's Grooming by Category: Value 2018-2023

Table 92 Sales of Men's Grooming by Category: % Value Growth 2018-2023

Table 93 Sales of Men's Razors and Blades by Type: % Value Breakdown 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 94 Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023

Table 95 NBO Company Shares of Men's Grooming: % Value 2019-2023

Table 96 LBN Brand Shares of Men's Grooming: % Value 2020-2023

Table 97 LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023

Table 98 Forecast Sales of Men's Grooming by Category: Value 2023-2028

Table 99 Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

ORAL CARE IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Brazil solidifies itself as the third largest oral care market globally

Strong advertising efforts and event sponsorship mainly focused on younger consumers

The importance of dentist endorsement and the prevalence of health and beauty specialists

PROSPECTS AND OPPORTUNITIES

Increasing government investment in oral health

Innovation expected to highly impact oral care over the coming years

New methods of nicotine consumption amongst youngsters may challenge oral health

CATEGORY DATA

Table 100 Sales of Oral Care by Category: Value 2018-2023

Table 101 Sales of Oral Care by Category: % Value Growth 2018-2023

Table 102 Sales of Toothbrushes by Category: Value 2018-2023

Table 103 Sales of Toothbrushes by Category: % Value Growth 2018-2023

Table 104 Sales of Toothpaste by Type: % Value Breakdown 2019-2023

Table 105 NBO Company Shares of Oral Care: % Value 2019-2023

Table 106 LBN Brand Shares of Oral Care: % Value 2020-2023

Table 107 LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2020-2023

Table 108 LBN Brand Shares of Toothpaste: % Value 2020-2023

Table 109 □Forecast Sales of Oral Care by Category: Value 2023-2028

Table 110 □Forecast Sales of Oral Care by Category: % Value Growth 2023-2028

Table 111 □Forecast Sales of Toothbrushes by Category: Value 2023-2028

Table 112 □Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

SKIN CARE IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lip care and basic moisturisers thrive, but skin care lags in beauty and personal care; competition with sun protection is still a barrier to growth in facial care

Beyond scent, skin healthcare is establishing itself as an avenue for growth in body care

Giftable items drive growth for direct selling and beauty specialists, while pharmacies and retail e-commerce lead in facial self-care

PROSPECTS AND OPPORTUNITIES

Trade-off between performance and values highlights contradictions in consumption

Extreme weather events related to climate change set to increase arbovirus cases, leading to higher repellent use and potential skin irritation

Private label makes pharmacies more than sales spaces, while grocery retailers innovate to overcome sales challenges

CATEGORY DATA

Table 113 Sales of Skin Care by Category: Value 2018-2023

Table 114 Sales of Skin Care by Category: % Value Growth 2018-2023

Table 115 NBO Company Shares of Skin Care: % Value 2019-2023

Table 116 LBN Brand Shares of Skin Care: % Value 2020-2023

Table 117 LBN Brand Shares of Basic Moisturisers: % Value 2020-2023

Table 118 LBN Brand Shares of Anti-agers: % Value 2020-2023

Table 119 LBN Brand Shares of Firming Body Care: % Value 2020-2023

Table 120 LBN Brand Shares of General Purpose Body Care: % Value 2020-2023

Table 121 LBN Brand Shares of Premium Skin Care: % Value 2020-2023

Table 122 □Forecast Sales of Skin Care by Category: Value 2023-2028

Table 123 □Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

SUN CARE IN BRAZIL

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising temperatures drive double-digit growth for sun care

Sun protection strengthens its position as a gateway for facial skin care in Brazil

Private label sun protection products are making headway in pharmacies

PROSPECTS AND OPPORTUNITIES

Climate change and Law 14.539/23 could increase demand for sun care in the forecast period

Multifunctionality could limit growth for sun protection

Diminishing significance of grocery retailers as sales move to pharmacies and retail e-commerce, while international purchases could pose a challenge

CATEGORY DATA

Table 124 Sales of Sun Care by Category: Value 2018-2023

Table 125 Sales of Sun Care by Category: % Value Growth 2018-2023

Table 126 NBO Company Shares of Sun Care: % Value 2019-2023

Table 127 LBN Brand Shares of Sun Care: % Value 2020-2023

Table 128 LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023

Table 129 Forecast Sales of Sun Care by Category: Value 2023-2028

Table 130 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 Brazil

Market Direction | 2024-07-23 | 178 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	€2675.00
	Multiple User License (1 Site)	€5350.00
	Multiple User License (Global)	€8025.00
	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="2026-02-17"/>
		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