

## **Brazil Hair Care - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 90 pages | Mordor Intelligence

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### **Report description:**

Brazil Hair Care Market Analysis

The Brazilian hair care market was valued at USD 6.71 billion in 2025 and estimated to grow from USD 7.04 billion in 2026 to reach USD 8.97 billion by 2031, at a CAGR of 4.97% during the forecast period (2026-2031). Rising digital commerce, premiumization, inclusivity for textured hair, and urban demand for scalp-health solutions drive the momentum. This shift is prompting brands to rethink their strategies and prioritize digital-first approaches to meet evolving consumer preferences. In response, brands innovate purposefully, introducing everything from peptide-based "skinified" treatments to vegan formulas inspired by Amazonian biodiversity. These innovations cater to growing consumer demand for sustainable and effective solutions. Opportunities are blooming in textured-hair care, clean beauty, and mini-size salon formats, which make professional technology accessible to a broader audience. While competitive intensity remains moderate, multinationals harness large-scale research to maintain their market position, and nimble domestic labels cultivate loyalty through cultural authenticity, personalized offerings, and a strong omnichannel presence.

Brazil Hair Care Market Trends and Insights

Digital-first beauty retail boom

In 2024, Brazil's e-commerce channel witnessed significant growth, increasing its share to represent a notable portion of the nation's total retail sales. Specialized hair-care brands are reaping significant benefits from marketplace integrations and social

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commerce, particularly on WhatsApp, a platform utilized by 95% of local businesses. These integrations enable brands to reach a wider audience, streamline customer interactions, and drive sales through personalized engagement. L'Oreal's Brazilian division proudly reports that 20% of its revenue now stems from digital avenues, underscoring the success of its influencer-driven campaigns and partnerships for same-day deliveries. These campaigns leverage the popularity of local influencers to build trust and drive consumer interest, while same-day delivery partnerships enhance convenience and customer satisfaction. This digital channel has alleviated previous shelf-space limitations, broadening the assortment for textured-hair products and clean beauty lines, and fostering a quicker adoption of these inclusive offerings. Additionally, reduced go-to-market expenses are luring indie brands, creating a positive feedback loop of expanding product assortments and heightened consumer exploration. This cycle not only benefits emerging brands but also enriches the overall shopping experience for consumers by offering greater variety and innovation.

#### Premiumization and "skinification" of hair products

Brazilian shoppers are increasingly treating their scalp and hair with the same care as their facial skin, seeking out clinically validated ingredients like peptides, ceramides, and microbiome balancers. This shift reflects a growing awareness of the importance of scalp health in achieving overall hair wellness. Products like Kerastase Premiere and L'Oreal Professionnel Absolut Repair Molecular showcase how science-backed claims can lead to increased consumer trust and higher sales, driving double-digit growth for L'Oreal's professional division in the first half of 2024. Urban consumers are adopting K-beauty-inspired multi-step routines, incorporating pre-shampoos, bond-repair concentrates, and overnight masks. These routines emphasize a holistic approach to hair care, mirroring trends seen in skincare. This growing sophistication allows for a pricing spectrum, from affordable luxuries to ultra-premium salon treatments, enabling sustained premium growth rates despite currency fluctuations.

#### High import taxes constrain innovation and accessibility

High duties of up to 60% on cosmetic imports, combined with state-level ICMS levies ranging from 17% to 20%, significantly raise landed costs. This financial burden discourages the early adoption of niche active ingredients, as it makes these products less competitive in the market. Furthermore, small-batch creators grapple with challenges like RADAR licensing and SISCOMEX registration, which involve complex bureaucratic processes and additional costs. These hurdles extend their launch timelines, especially when compared to counterparts in Mexico or Chile, where regulatory frameworks are more streamlined. While the upcoming tariff review in April 2025 (Resolution 714) holds the promise of streamlining certain codes and potentially reducing costs, the prevailing uncertainty surrounding its implementation casts a shadow on research and development investments for innovative ingredients, as companies remain cautious about committing resources to untested regulatory outcomes.

Other drivers and restraints analyzed in the detailed report include:

Demand for textured-hair and ethnic-specific formulations  
Expansion of dermo-cosmetics and scalp-health categories  
Environmental regulations create formulation constraints

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

In Brazil's hair care market, conditioners dominate, capturing 32.31% of the 2025 revenue. Their significance is underscored in humid climates, where they play a pivotal role in grooming routines, especially for maintaining cuticle health. While there's a robust demand for conditioners, consumers with curly hair are leaning more towards leave-in masks and co-washing creams. These preferences not only sustain usage frequency but also consistently boost unit volumes. Furthermore, the launch of eco-friendly refill pouches has bolstered brand loyalty, driving repeat purchases. This blend of practicality and sustainable

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packaging cements the conditioner segment's stronghold in the market.

Hair colorants are emerging as the fastest-growing segment, boasting a projected CAGR of 5.93%. Their rise is largely attributed to the viral popularity of trends like balayage, fantasy colors, and gray blending on social media. As hybrid work models gain traction, there's been a notable uptick in the use of at-home coloring kits, making DIY hair coloring a norm. This shift not only amplifies the demand for color-care products, such as tonal preserving shampoos, but also broadens the hair care market. In response, manufacturers are rolling out bond-repair boosters to mitigate coloring-induced damage, paving the way for premium product offerings. Together, these innovations and evolving lifestyle trends are propelling the hair color segment's rapid ascent.

In 2025, conventional formulations dominated Brazil's hair care market, seizing a commanding 78.75% share. This robust preference underscores consumer trust in established actives, such as silicones and quaternary ammonium compounds. These ingredients are prized for imparting a soft, touchable feel, a quality especially cherished in tropical climates. Price competitiveness plays a pivotal role, with budget-conscious consumers, including minimum-wage earners, keenly focusing on maximizing yield per milliliter. The widespread availability and reliable performance of these conventional products fortify their leading stance. Furthermore, their affordability and accessibility render them appealing to a diverse consumer base. In essence, conventional formulations underscore the market's valuation of proven efficacy paired with cost efficiency.

Natural and organic hair care products are carving out a significant niche, with projections pointing to a robust 5.52% CAGR. These products harness unique emollients sourced from the rainforest and emphasize sulfate-free surfactants, targeting health- and eco-conscious consumers. Certifications like vegan and cruelty-free amplify their appeal, especially among younger Gen-Z buyers who prioritize ethical considerations. The rise of "cleanical" hybrid products, merging botanical oils with cutting-edge peptide science, is set to eclipse pure natural formulations shortly. This innovative blend promises consumers the advantages of both natural ingredients and scientifically validated efficacy. As a result, the natural and organic segments are primed for rapid expansion, fueled by shifting consumer values and preferences.

The Brazil Hair Care Market Report is Segmented by Product Type (Shampoo, Conditioner, Hair Color, Hair Styling Products, Perms and Relaxants, Others), Category (Natural/Organic, Conventional/Synthetic), Price Range (Mass, Premium), Distribution Channel (Supermarkets/Hypermarkets, Health and Beauty Stores, Online Retail Stores, Other Channels). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

L'Oreal SA Unilever Brasil Procter & Gamble Brasil Natura & Co Coty Inc. Johnson & Johnson Consumer Health Henkel AG & Co. KGaA Grupo Boticario Keune Haircosmetics Brazil Embelleze Salon Line Skala Cosmetico's Davines Group Moroccanoil Wella Company Schwarzkopf Professional Inoar Cosmetico's Bio Extratus Amend Cosmetico's Lola Cosmetics Haskell Cosmetico's

Additional Benefits:

- <ul> The market estimate (ME) sheet in Excel format
- 3 months of analyst support </ul>

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