

Natura&Co in Beauty and Personal Care

September 2023

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Fragrances remains the leading category, but regional performance is diverse in 2022

STATEOF PLAY

Natura&Co's growth from Market Momentum and MnA, despite stable Market Share

F rom expansion to o ptimisation: The positive impact of a convergent purpose among brands

For every BRL1 of revenue, Natura generates BRL2.7 of positive socio-environmental impact

Natura&Co inspires public policies for the protection of women in Brazil

Natura was the first publicly traded company to achieve B Corporation certification

Natura&Co innovates in products connecting quality and sustainability

Consumer perceptions of Natura&Co brands

EXPOSURE TO FUTURE GROWTH

Natura&Co expected to climb in rank, but Aesop sale and The Body Shop cast uncertainty Euromonitor's latest projections for 2023 predict growth in Latin America for Natura&Co LATAM remains Natura&Co's primary market, despite the slight decline in share in 2022 The Body Shop's dips in largest markets too big to offset growth in smaller, emerging markets Natura&Co benefits from online presence across a diversified product portfolio Operations are optimised through digitisation and financial services offered by &Co Pay Emotional connection in direct selling converges with digital channels through social selling

COMPETITIVE POSITIONING

Natura&Co maintains stability in market share after the leap taken in 2020 L'Oréal Groupe remains Natura&Co's biggest competitor

Strong category penetration for Natura&Co in fragrances, skin care and bath and shower Resilient Latin American presence amid global challenges

Natura&Co reduces operations in Russia and reaffirms its responsibility for human rights
Beauty and personal care remains top industry for direct selling despite channel slowdown
Brazil remains the main direct selling market for beauty and personal care in the world
Enhancing brand trust: Digitisation expands reach while shared values deepen connection
Natura&Co is at the forefront of the process of democratising access to sustainable products
Consumer perceptions, direct selling brands: Ingredients and quality stand out for Natura

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Natura&Co maintains fifth position globally in fragrances and leadership in mass segment Ingredient-led beauty: Fragrance innovation in sustainability combined with quality

SKIN CARE

Natura&Co sustains eighth global position in skin care with prominence in body care

SKINCARE

Expanding wellness frontiers through skin care: Correlation with fragrances

COLOUR COSMETICS

Natura&Co drops from sixth to 10th in colour cosmetics between 2020 and 2022 Avon ramps up presence on TikTok to reach Generation Z consumers

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Projected company sales: FAQs (1/2) Projected company sales: FAQs (2/2)

Overview of Beauty Survey: Product and brand coverage

Overview of Beauty Survey

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/naturaandco-in-beauty-and-personal-care/report.