Beauty and Personal Care in Brazil

EXECUTIVE SUMMARY

Beauty and personal care in 2022: The big picture
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Competitive landscape
Retailing developments
What next for beauty and personal care?

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DISCLAIMER

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Baby and Child-Specific Products in Brazil

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2022 DEVELOPMENTS

Baby and child-specific products shows growth in 2022, with the highlight being essential categories
Consumer demand for greater diversity, sustainability and gifts shapes players’ strategies
Trust is a key element that maintains the lead of Johnson & Johnson and Natura Cosméticos

PROSPECTS AND OPPORTUNITIES

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Inflation shades growth driven by increasing frequency of showers, and gifting during the return to socialisation
Polarisation process intensifies between giftable items and self-use products
An increasing variety of channels is intensifying participation in hygiene categories

PROSPECTS AND OPPORTUNITIES

More sustainable and healthier options with innovative fragrances and packaging expected in the coming years
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Colour Cosmetics in Brazil

KEY DATA FINDINGS

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Sales of colour cosmetics once again on the rise due to the return of socialisation, driven by budget-friendly options
Search for cost-effectiveness breaks the barrier between categories and enhances the synergy of colour cosmetics with skin care and sun care
Direct selling loses momentum in the face of new sales formats

PROSPECTS AND OPPORTUNITIES

The forecast period indicates a promising future for colour cosmetics, primarily driven by a focus on skin health and convenience
Beauty trends will continue to be influenced by the presence and activities of celebrities and influencers
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Deodorants in Brazil

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Focus on sophisticated and sustainable launches to avoid the price war
Grocery retailers remains the main distribution channel, although health and beauty specialists benefits from sophisticated launches

PROSPECTS AND OPPORTUNITIES
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A growing number of successful beauty salons expand via franchising

PROSPECTS AND OPPORTUNITIES
Brand extensions for skin care offer opportunities in pre- and post-depilation procedures
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Fragrances in Brazil

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Fragrances is the biggest beauty star, and premium continues to outperform mass
Fragrances are established as a visual experience and a vector of emotions
Bricks-and-mortar stores make a strong comeback, with apparel and footwear specialists emerging as a key channel

PROSPECTS AND OPPORTUNITIES
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Climate change is influencing company strategy, with the adaptation of ingredients and formats
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**CATEGORY DATA**

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**Hair Care in Brazil**

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**2022 DEVELOPMENTS**

Intra-category polarisation: Saving on shampoos to invest more in hair treatments
Scalp care gains prominence after COVID-19, with skinification a growth driver
E-commerce and pharmacies gain prominence at the expense of grocery retailers

**PROSPECTS AND OPPORTUNITIES**

The search for naturalness in beauty to drive the market for curly hair products
Multifunctionality was aimed at women, but it may also hit the male market
A multichannel presence set to gain strength due to increased competition and the rise of D2C

**CATEGORY DATA**

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**2022 DEVELOPMENTS**

Despite the challenges of inflation, men’s fragrances continues to be a driving force
The maturity of men’s fragrances and men’s shaving leads to new developments in other categories
Barber shops have maintained relevance since their boom in the early 2010s

**PROSPECTS AND OPPORTUNITIES**

Men’s fragrances still expected to post the fastest value growth over the coming years
The extensive network of barber shops set to support more sophisticated consumption
Younger generations are more connected to global novelties, accelerating the impact of innovations
KEY DATA FINDINGS

2022 DEVELOPMENTS
Oral care grows in an environment of rising prices, despite trading down
Segmentation to meet specific needs across different ages and consumer habits
Health and beauty specialists is a growth channel in 2022

PROSPECTS AND OPPORTUNITIES
Consumers’ emphasis on preventative health and cost savings drives a positive outlook for oral care
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Skin Care in Brazil

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2022 DEVELOPMENTS
Scented body care continues to be a trend, but facial care sees growing demand amongst Brazilians
Embracing beauty from within: The blurring boundaries of beauty and health in Brazil, led by ingredients
E-commerce expansion and customer centricity

PROSPECTS AND OPPORTUNITIES
Facial care set to accelerate its growth and narrow the gap with body care in the forecast period
The pursuit of aesthetic procedures and the use of skin care products have become complementary
Pharmacies differentiate the positioning of brands in physical spaces, and apparel and footwear specialists may emerge as a new relevant channel
Sun Care in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sun protection sees double-digit value growth in 2022
Innovation in facial sun care products persists, driven by the ongoing focus on incorporating value-added features
Sun care manufacturers and retailers actively embrace sustainability initiatives

PROSPECTS AND OPPORTUNITIES

Expansion of use of sun protection amongst the population set to drive growth
Increased competition, with new players and SPF beauty products
The evolving landscape of sun care distribution: Embracing convenience, digital engagement, and experiential retail

CATEGORY DATA

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Premium Beauty and Personal Care in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS

Increased demand for aesthetic procedures drives growth in premium skin care and adult sun care, but fragrances remains the highlight
With the return of busy routines outside the home, availability of miniatures grows
The desire for exclusivity in premium consumption drives personalisation and adaptation of the in-store experience

PROSPECTS AND OPPORTUNITIES

Favourable winds dictate new directions for the economy, but international travel could once again be a threat
Wellbeing and recognised ingredients to dictate the tone of consumer demand
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Mass Beauty and Personal Care in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS
Facial skin care and adult sun care boost mass beauty and personal care, but fragrances maintains its leading role
Trading down in hygiene to sustain consumption in beauty, and trading across in gifts
Grocery retailers faces challenges from inflationary pressure, driving the rise of new distribution channels

PROSPECTS AND OPPORTUNITIES
Slight upturn in macroeconomic indicators, increase in welfare benefits, and sustainability suggest a positive forecast
Influencers will increasingly shape brands and products, considering importance of social media
Masstige and D2C emerge as favourable trends for forecast growth

CATEGORY DATA

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