Beauty and Personal Care in Brazil

EXECUTIVE SUMMARY

Beauty and personal care in 2022: The big picture
2022 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 2017-2022
Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2018-2022
Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2018-2022
Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2017-2022
Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2017-2022
Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2022
Table 9 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2022-2027
Table 10 - Forecast Sales of Beauty and Personal Care by Category: Value 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Brazil

KEY DATA FINDINGS

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

Growing demand expected for dermocosmetics in baby and child-specific products in Brazil
Convenience and connection are drivers of premiumisation
E-commerce boom and retail adaptation: Transforming baby and child-specific products in Brazil

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2017-2022
Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022
Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in Brazil
KEY DATA FINDINGS

2022 DEVELOPMENTS

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
Intimate hygiene set to see innovations as a result of increasing demand
Local producers and Brazilian ingredients expected to continue to gain traction

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2017-2022
Table 23 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 25 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 26 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
Table 28 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS

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
Opportunities and challenges through e-commerce in the coming years

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2018-2022
Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
Table 35 - LBN Brand Shares of Eye Make-up: % Value 2019-2022
Table 36 - LBN Brand Shares of Facial Make-up: % Value 2019-2022
Table 37 - LBN Brand Shares of Lip Products: % Value 2019-2022
Table 38 - LBN Brand Shares of Nail Products: % Value 2019-2022
Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

Deodorants in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS
Return to socialisation leads to more baths and increasing reaplication of deodorant.
Focus on sophisticated and sustainable launches to avoid the price war.
Grocery retailers remain the main distribution channel, although health and beauty specialists benefit from sophisticated launches.

**PROSPECTS AND OPPORTUNITIES**
Growing awareness of and concern over wellbeing and sustainability favour natural products.
New opportunities in the assortment of fragrances available in the market.
Innovation in packaging, with eco-friendly aerosols and refillable products expected to gain space.

**CATEGORY DATA**

- Table 42 - Sales of Deodorants by Category: Value 2017-2022
- Table 43 - Sales of Deodorants by Category: % Value Growth 2017-2022
- Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
- Table 45 - NBO Company Shares of Deodorants: % Value 2018-2022
- Table 46 - LBN Brand Shares of Deodorants: % Value 2019-2022
- Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2019-2022
- Table 48 - Forecast Sales of Deodorants by Category: Value 2022-2027
- Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
- Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

**Depilatories in Brazil**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**
Colder summer and inflation peak hinder rebound for depilatories in 2022.
Launches focus on skin sensitivity, comfort and efficiency in the depilation process.
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.
Popularisation of laser hair removal may reduce demand for traditional depilatories in the long term.
High- and low-end offers to become highly relevant due to polarised consumption.

**CATEGORY DATA**

- Table 51 - Sales of Depilatories by Category: Value 2017-2022
- Table 52 - Sales of Depilatories by Category: % Value Growth 2017-2022
- Table 53 - Sales of Women’s Razors and Blades by Type: % Value Breakdown 2018-2022
- Table 54 - NBO Company Shares of Depilatories: % Value 2018-2022
- Table 55 - LBN Brand Shares of Depilatories: % Value 2019-2022
- Table 56 - Forecast Sales of Depilatories by Category: Value 2022-2027
- Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

**Fragrances in Brazil**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**
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**
The return of socialisation and premium brands will continue driving growth.
Climate change is influencing company strategy, with the adaptation of ingredients and formats.
From digital to physical, fragrances follows the path dictated by skin care

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2017-2022
Table 59 - Sales of Fragrances by Category: % Value Growth 2017-2022
Table 60 - NBO Company Shares of Fragrances: % Value 2018-2022
Table 61 - LBN Brand Shares of Fragrances: % Value 2019-2022
Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022
Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022
Table 64 - Forecast Sales of Fragrances by Category: Value 2022-2027
Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2022-2027

Hair Care in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS

Intra-category polarisation: Saving on shampoo 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

Table 66 - Sales of Hair Care by Category: Value 2017-2022
Table 67 - Sales of Hair Care by Category: % Value Growth 2017-2022
Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2017-2022
Table 69 - NBO Company Shares of Hair Care: % Value 2018-2022
Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
Table 71 - LBN Brand Shares of Hair Care: % Value 2019-2022
Table 72 - LBN Brand Shares of Colourants: % Value 2019-2022
Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
Table 74 - LBN Brand Shares of Styling Agents: % Value 2019-2022
Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2019-2022
Table 76 - Forecast Sales of Hair Care by Category: Value 2022-2027
Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in Brazil

KEY DATA FINDINGS

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
Oral Care in Brazil

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
Repercussions of the pandemic: The rise in cases of anxiety amplifies the demand for products targeting tooth sensitivity
Oral care set to attract more brands from other industries, but power toothbrushes will remain an emerging category

CATEGORY DATA
Table 88 - Sales of Oral Care by Category: Value 2017-2022
Table 89 - Sales of Oral Care by Category: % Value Growth 2017-2022
Table 90 - Sales of Toothbrushes by Category: Value 2017-2022
Table 91 - Sales of Toothbrushes by Category: % Value Growth 2017-2022
Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2018-2022
Table 93 - NBO Company Shares of Oral Care: % Value 2018-2022
Table 94 - LBN Brand Shares of Oral Care: % Value 2019-2022
Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2019-2022
Table 96 - LBN Brand Shares of Toothpaste: % Value 2019-2022
Table 97 - Forecast Sales of Oral Care by Category: Value 2022-2027
Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
Table 99 - Forecast Sales of Toothbrushes by Category: Value 2022-2027
Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

Skin Care in Brazil

KEY DATA FINDINGS

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
### CATEGORY DATA

**Table 101** - Sales of Skin Care by Category: Value 2017-2022  
**Table 102** - Sales of Skin Care by Category: % Value Growth 2017-2022  
**Table 103** - NBO Company Shares of Skin Care: % Value 2018-2022  
**Table 104** - LBN Brand Shares of Skin Care: % Value 2019-2022  
**Table 105** - LBN Brand Shares of Basic Moisturisers: % Value 2019-2022  
**Table 106** - LBN Brand Shares of Anti-agers: % Value 2019-2022  
**Table 107** - LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2019-2022  
**Table 108** - LBN Brand Shares of General Purpose Body Care: % Value 2019-2022  
**Table 109** - LBN Brand Shares of Premium Skin Care: % Value 2019-2022  
**Table 110** - Forecast Sales of Skin Care by Category: Value 2022-2027  
**Table 111** - Forecast Sales of Skin Care by Category: % Value Growth 2022-2027

### 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

**Table 112** - Sales of Sun Care by Category: Value 2017-2022  
**Table 113** - Sales of Sun Care by Category: % Value Growth 2017-2022  
**Table 114** - NBO Company Shares of Sun Care: % Value 2018-2022  
**Table 115** - LBN Brand Shares of Sun Care: % Value 2019-2022  
**Table 116** - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022  
**Table 117** - Forecast Sales of Sun Care by Category: Value 2022-2027  
**Table 118** - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

### 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  
- Hybrid sales formats could boost premium and professional hair care

**Table 119** - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022  
**Table 120** - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022  
**Table 121** - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
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
Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2022-2027

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