Beauty and Personal Care in Peru

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 2019-2022
Table 6 - Forecast Sales of Beauty and Personal Care by Category: Value 2022-2027
Table 7 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Peru

KEY DATA FINDINGS

2022 DEVELOPMENTS

Baby wipes leads growth in baby and child-specific products
Consumers look for price savings but are unwilling to forgo quality in this highly sensitive category
Kimberly-Clark expands its baby care portfolio to take the category lead, while Johnson & Johnson falls into second spot

PROSPECTS AND OPPORTUNITIES

Men increase their involvement in parenting over the forecast period
Trends towards natural and environmentally-friendly products continue growing over the forecast period
Economic and political uncertainty impact consumption and boost demand for private label

CATEGORY DATA

Table 8 - Sales of Baby and Child-specific Products by Category: Value 2017-2022
Table 9 - Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
Table 10 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
Table 11 - NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
Table 12 - LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
Table 13 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022
Table 14 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
Table 15 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
Table 16 - Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
Table 17 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
Table 18 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in Peru

KEY DATA FINDINGS

2022 DEVELOPMENTS
Hygiene habits generated by the pandemic are maintained despite a decrease in COVID-19 levels
Usage of natural ingredients gains ground in premium bath and shower
Colgate-Palmolive consolidates its leadership in bath and shower

PROSPECTS AND OPPORTUNITIES
Hand sanitisers continues to lose ground in the Peruvian market over the forecast period
Private label expands in bath and shower over the forecast period
Innovation in bath and shower is key in boosting forecast period sales, especially in the large but mature and seasonal category bar soap

CATEGORrY DATA
Table 19 - Sales of Bath and Shower by Category: Value 2017-2022
Table 20 - Sales of Bath and Shower by Category: % Value Growth 2017-2022
Table 21 - Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
Table 22 - NBO Company Shares of Bath and Shower: % Value 2018-2022
Table 23 - LBN Brand Shares of Bath and Shower: % Value 2019-2022
Table 24 - LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
Table 25 - Forecast Sales of Bath and Shower by Category: Value 2022-2027
Table 26 - Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
Table 27 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in Peru

KEY DATA FINDINGS
2022 DEVELOPMENTS
Liberalisation of COVID-19 restrictions boosts sales of colour cosmetics
Social networks become important in the acceptance of new product launches
Products with additional benefits contribute to improve the image of colour cosmetics

PROSPECTS AND OPPORTUNITIES
Direct selling remains the leading sales channel for colour cosmetics over the forecast period
Colour cosmetics sales achieve full recovery in 2023 with wider availability of multifunctional products likely
Permanent make up treatments gain ground but remain small scale compared to colour cosmetics

CATEGORY DATA
Table 28 - Sales of Colour Cosmetics by Category: Value 2017-2022
Table 29 - Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
Table 30 - NBO Company Shares of Colour Cosmetics: % Value 2018-2022
Table 31 - LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
Table 32 - LBN Brand Shares of Eye Make-up: % Value 2019-2022
Table 33 - LBN Brand Shares of Facial Make-up: % Value 2019-2022
Table 34 - LBN Brand Shares of Lip Products: % Value 2019-2022
Table 35 - LBN Brand Shares of Nail Products: % Value 2019-2022
Table 36 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
Table 37 - Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
Table 38 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

Deodorants in Peru

KEY DATA FINDINGS
2022 DEVELOPMENTS
Deodorant sales continue to recover in the Peruvian market
Inflation contributes to growth in deodorant creams and small packaging formats
Secret suffers a product recall in the Peruvian market

PROSPECTS AND OPPORTUNITIES

Deodorants return to pre-pandemic sales over the forecast period
Deodorants with natural ingredients gather momentum over the forecast period
Unilever retains category lead

CATEGORY DATA

Table 39 - Sales of Deodorants by Category: Value 2017-2022
Table 40 - Sales of Deodorants by Category: % Value Growth 2017-2022
Table 41 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022
Table 42 - NBO Company Shares of Deodorants: % Value 2018-2022
Table 43 - LBN Brand Shares of Deodorants: % Value 2019-2022
Table 44 - LBN Brand Shares of Premium Deodorants: % Value 2019-2022
Table 45 - Forecast Sales of Deodorants by Category: Value 2022-2027
Table 46 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
Table 47 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

Depilatories in Peru

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sales of depilatories are benefited from the lifting of COVID-19 mobility restrictions
Products designed for men expand their presence in the Peruvian market while women’s pre-shave remains non-existent
Companies implement a number of different strategies in order to alleviate the effects of inflation on their sales

PROSPECTS AND OPPORTUNITIES

Competition increases in depilatories
Growth in professional beauty treatments does not represent a strong threat to depilatories
Creams remains the preferred format in hair removers/bleaches

CATEGORY DATA

Table 48 - Sales of Depilatories by Category: Value 2017-2022
Table 49 - Sales of Depilatories by Category: % Value Growth 2017-2022
Table 50 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2018-2022
Table 51 - NBO Company Shares of Depilatories: % Value 2018-2022
Table 52 - LBN Brand Shares of Depilatories: % Value 2019-2022
Table 53 - Forecast Sales of Depilatories by Category: Value 2022-2027
Table 54 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

Fragrances in Peru

KEY DATA FINDINGS

2022 DEVELOPMENTS

The resumption in society and return to pre-pandemic lifestyles benefit sales of fragrances
Mass fragrances retains its dominance while premium brands change strategy to improve sales
Fragrances sets/kits remains a seasonal product

PROSPECTS AND OPPORTUNITIES

Direct sellers remains an important channel for fragrances over the forecast period
Retail e-commerce continues growing over the forecast period
Local and artisanal fragrances gain ground in the Peruvian market
KEY DATA FINDINGS

2022 DEVELOPMENTS
Lower mobility restrictions contribute to recovery of the hair care category
Companies adapt to price increases in hair care in response to inflationary context
Industry players in hair care are active in new product developments during 2022

PROSPECTS AND OPPORTUNITIES
New formats gain ground in hair care over the forecast period
Salon professional hair care products lead growth over the forecast period
Private label products expand in hair care

CATEGORICAL DATA
Table 63 - Sales of Hair Care by Category: Value 2017-2022
Table 64 - Sales of Hair Care by Category: % Value Growth 2017-2022
Table 65 - Sales of Hair Care by Premium vs Mass: % Value 2017-2022
Table 66 - NBO Company Shares of Hair Care: % Value 2018-2022
Table 67 - NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
Table 68 - LBN Brand Shares of Hair Care: % Value 2019-2022
Table 69 - LBN Brand Shares of Colourants: % Value 2019-2022
Table 70 - LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
Table 71 - LBN Brand Shares of Styling Agents: % Value 2019-2022
Table 72 - LBN Brand Shares of Premium Hair Care: % Value 2019-2022
Table 73 - Forecast Sales of Hair Care by Category: Value 2022-2027
Table 74 - Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
Table 75 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in Peru

KEY DATA FINDINGS

2022 DEVELOPMENTS
Skin care experiences rapid growth in men's grooming
Stable presence of barber shops fuels growth in men's hair care
Deodorant sprays remains the preferred format in men's deodorants, while constraints on disposable incomes stimulates a shift to generic products for the whole family

PROSPECTS AND OPPORTUNITIES
Ongoing growth of men's grooming over the forecast period
Men's skin care remains a small category with high forecast period growth coming from a low base
Direct selling continues to drive men's grooming
KEY DATA FINDINGS

2022 DEVELOPMENTS

Oral care benefits from the resumption of society in the wake of the COVID-19 pandemic
Denture care expands in the Peruvian market thanks to the ageing of the population and new product launches
Toothpaste has an advantage in dealing with inflation thanks to a wide range of product sizes and promotions

PROSPECTS AND OPPORTUNITIES

Premiumisation in oral care seen over the forecast period
Ongoing growth for oral care over the forecast period
Positive performance for sustainable toothbrushes over the forecast period thanks to rising environmental awareness

CATEGORY DATA

Table 85 - Sales of Oral Care by Category: Value 2017-2022
Table 86 - Sales of Oral Care by Category: % Value Growth 2017-2022
Table 87 - Sales of Toothbrushes by Category: Value 2017-2022
Table 88 - Sales of Toothbrushes by Category: % Value Growth 2017-2022
Table 89 - Sales of Toothpaste by Type: % Value Breakdown 2018-2022
Table 90 - NBO Company Shares of Oral Care: % Value 2018-2022
Table 91 - LBN Brand Shares of Oral Care: % Value 2019-2022
Table 92 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2019-2022
Table 93 - LBN Brand Shares of Toothpaste: % Value 2019-2022
Table 94 - Forecast Sales of Oral Care by Category: Value 2022-2027
Table 95 - Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
Table 96 - Forecast Sales of Toothbrushes by Category: Value 2022-2027
Table 97 - Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

Skin Care in Peru

KEY DATA FINDINGS

2022 DEVELOPMENTS

Skin care growth remains steady in the Peruvian market after COVID-19 restrictions are lifted as consumers become more aware of the importance of regular skin care routines
Azzorti offers retail brands the possibility to access direct selling distribution
Yanbal revamps the image of its classic Sentiva brand

PROSPECTS AND OPPORTUNITIES

Artisanal skin care expands its presence in the Peruvian market
Skin care cosmetic treatments grow in popularity over the forecast period
Anti-agers remains a rapidly growing category over the forecast period
CATEGORY DATA

Table 98 - Sales of Skin Care by Category: Value 2017-2022
Table 99 - Sales of Skin Care by Category: % Value Growth 2017-2022
Table 100 - NBO Company Shares of Skin Care: % Value 2018-2022
Table 101 - LBN Brand Shares of Skin Care: % Value 2019-2022
Table 102 - LBN Brand Shares of Basic Moisturisers: % Value 2019-2022
Table 103 - LBN Brand Shares of Anti-agers: % Value 2019-2022
Table 104 - LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2019-2022
Table 105 - LBN Brand Shares of General Purpose Body Care: % Value 2019-2022
Table 106 - LBN Brand Shares of Premium Skin Care: % Value 2019-2022
Table 107 - Forecast Sales of Skin Care by Category: Value 2022-2027
Table 108 - Forecast Sales of Skin Care by Category: % Value Growth 2022-2027

KEY DATA FINDINGS

2022 DEVELOPMENTS

Lower mobility restrictions favour sun care sales
Change in weather conditions contributes to the development of sun care
Sun care faces strong price increases as most of these products are imported

PROSPECTS AND OPPORTUNITIES

Continued growth for sun protection and the development of natural ingredients
Hectic lifestyles stimulate growth of sun care products with multiple benefits
Aftersun leads growth in secondary sun care categories, while self-tanning suffers from its perception around chemical contents

CATEGORICAL DATA

Table 109 - Sales of Sun Care by Category: Value 2017-2022
Table 110 - Sales of Sun Care by Category: % Value Growth 2017-2022
Table 111 - NBO Company Shares of Sun Care: % Value 2018-2022
Table 112 - LBN Brand Shares of Sun Care: % Value 2019-2022
Table 113 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022
Table 114 - Forecast Sales of Sun Care by Category: Value 2022-2027
Table 115 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

Sun Care in Peru

KEY DATA FINDINGS

2022 DEVELOPMENTS

Premium brands react to consumer migration to dermocosmetics
Inflation has a moderate impact on sales of premium beauty and personal care products
Recovery in international travel impacts premium beauty and personal care sales locally

PROSPECTS AND OPPORTUNITIES

L'Oréal Perú SA maintains leadership in premium beauty and personal care
Fragrances remains the most important category in premium beauty and personal care while more people develop an interest in premium sun care
Baby and child-specific products has potential to develop in premium beauty and personal care

CATEGORICAL DATA

Table 116 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022
Table 117 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 118 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
Table 119 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022
Table 120 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2022-2027
Table 121 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2022-2027

Mass Beauty and Personal Care in Peru

KEY DATA FINDINGS

2022 DEVELOPMENTS
High inflation levels impact mass beauty and personal care products
Private label increases its presence in the Peruvian market
Consumers are better educated on product characteristics

PROSPECTS AND OPPORTUNITIES
Direct selling maintains leadership in mass beauty and personal care
Private label products continue gaining ground in the Peruvian market
Dermocosmetics continues growing over the forecast period

CATEGORY DATA
Table 122 - Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
Table 123 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
Table 124 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
Table 125 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
Table 126 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
Table 127 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2022-2027

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