

# **Beauty and Personal Care in Mexico**

June 2023

**Table of Contents** 

## Beauty and Personal Care in Mexico

## 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 - 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 2022-2027
Table 10 - 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 Mexico

**KEY DATA FINDINGS** 

#### 2022 DEVELOPMENTS

Lifting of COVID-19 restrictions provides a boost to sales of baby and child-specific sun care Growing focus on the skin care needs of children benefits sales Baby wipes benefiting from multipurpose usage and increased focus on hygiene

#### PROSPECTS AND OPPORTUNITIES

Millennial parents expecting more from the brands they buy from Bonding moments could offer new opportunities for the development of baby and child-specific toiletries

## 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 Skin Care: % Value 2019-2022
Table 16 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
Table 17 - LBN Brand Shares of Premium Baby and Child-specific Products: % 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 Mexico

KEY DATA FINDINGS

## 2022 DEVELOPMENTS

Convenience supports ongoing shift towards liquid formats Demand for hand sanitisers remains higher than pre-pandemic levels despite a drop in sales Competition being driven by focus on low prices and value for money

## PROSPECTS AND OPPORTUNITIES

Liquid formats present opportunities for innovation in a saturated market. Consumers remain concerned about their health, even as the pandemic is declared at an end Matching product claims with consumer expectations key to success

## CATEGORY DATA

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

## Colour Cosmetics in Mexico

#### **KEY DATA FINDINGS**

## 2022 DEVELOPMENTS

Sales of colour cosmetics continue to recover but obstacles remain to a full recovery Continued use of face masks continues to influence demand Nail polish benefits from DIY trend

## PROSPECTS AND OPPORTUNITIES

Consumers expected to look for more from their colour cosmetics Generation Z bring new demands to colour cosmetics Retail e-commerce set to benefit from investment and new innovation

## 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 Growth 2022-2027
Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

## Deodorants in Mexico

## KEY DATA FINDINGS

## 2022 DEVELOPMENTS

Brands bet on new marketing platforms to promote their deodorants

Scent takes centre stage as companies seek to close the gap with fragrances Consumers assess more natural formulations in deodorants as health concerns grow

## PROSPECTS AND OPPORTUNITIES

Players focus on adapting their product positioning to benefit from the growth of e-commerce Shrinkflation and value for money to remain in focus Deodorant sprays and sticks likely to provide strong sales competition with each category offering different benefits

## CATEGORY DATA

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

## Depilatories in Mexico

## **KEY DATA FINDINGS**

## 2022 DEVELOPMENTS

As life returns to relative normality volume sales bounce back Hair removers/bleaches proving popular driven by new product development and innovation Gillette retains a strong lead as women's razors and blades continues to dominate sales

#### PROSPECTS AND OPPORTUNITIES

Is body hair becoming fashion statement for women? Professional services threaten to steal sales away from depilatories Putting women in control likely to be a prominent feature of marketing and new product development

## 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 Mexico

## **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Fragrances sees a strong recovery as consumers return to their old routines Consumers invest in premium fragrances to help elevate their mood Fragrances benefit from the growing desire to smell clean as well as feel clean

## PROSPECTS AND OPPORTUNITIES

The desire for affordable luxury set to drive demand for premium fragrances Gifting likely to play a key role in sales of fragrances Sustainability a growing concern for manufacturers

## 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 Mexico

#### **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Hair care bounces back Consumers show willingness to invest in their look as life returns to normality Colourants remain popular even as hair salons reopen

## PROSPECTS AND OPPORTUNITIES

Standard shampoos becoming increasingly sophisticated Focus likely to be on the "skinification" of hair care Sustainability a growing concern

## 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 Premium vs Mass: % Value 2022-2027

#### Men's Grooming in Mexico

## **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Mixed feelings about men's grooming and masculinity remains a challenge Men's grooming geared more towards wealthier households and single men Smaller players finding their own voice in men's grooming

## PROSPECTS AND OPPORTUNITIES

TikTok is teaching the next generation of young men how to take care of themselves. Men's grooming brands target the gaming community Focus shifting away from traditional stereotypes around masculinity

## CATEGORY DATA

Table 79 - Sales of Men's Grooming by Category: Value 2017-2022

- Table 80 Sales of Men's Grooming by Category: % Value Growth 2017-2022
- Table 81 Sales of Men's Razors and Blades by Type: % Value Breakdown 2019-2022
- Table 82 Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022
- Table 83 NBO Company Shares of Men's Grooming: % Value 2018-2022
- Table 84 LBN Brand Shares of Men's Grooming: % Value 2019-2022
- Table 85 LBN Brand Shares of Men's Razors and Blades: % Value 2019-2022
- Table 86 Forecast Sales of Men's Grooming by Category: Value 2022-2027
- Table 87 Forecast Sales of Men's Grooming by Category: % Value Growth 2022-2027

## Oral Care in Mexico

#### **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Oral care benefits from a return to old habits as COVID-19 fears subside Consumers show willingness to invest in a wider range of oral care products as they look to achieve a Hollywood smile As consumers return to the dentist oral hygiene problems come under the microscope

## PROSPECTS AND OPPORTUNITIES

"Skinification" of oral care a growing trend Increasing sophistication expected to be seen as players target wealthier consumers Players focusing on offering more natural and sustainable solutions

## 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 Oral Care by Category: Value 2022-2027
Table 97 - Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
Table 98 - Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027
Table 99 - Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

## Skin Care in Mexico

#### **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Skin care thriving as consumers return to their old lifestyle habits Consumers go in search of multifunctional products as part of a "Skinamilism" trend Consumers becoming more conscious of the wider impact of their purchasing decisions

## PROSPECTS AND OPPORTUNITIES

Consumers focusing more on skin health over the appearance of their skin Players look beyond the face in developing new product lines Skin care routines will remain important but could become shorter

#### 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

## Sun Care in Mexico

## **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Sun care bounces back as Mexicans return to the coast for their holidays Environmental concerns impacting purchasing decisions Consumers look for more from their sun care than just protection

#### PROSPECTS AND OPPORTUNITIES

Sun care set to face strong competition from other multifunctional skin care and colour cosmetics products "Skinification" of sun care should help to add value to the category Competition set to heat up as brands target different price segments with a varied offer

## CATEGORY DATA

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

#### Premium Beauty and Personal Care in Mexico

## KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Premium segment continues its strong re-bound in post-pandemic Mexico Mexicans return to department stores for their premium experience Ties between premium brands and wellness grow stronger

#### PROSPECTS AND OPPORTUNITIES

Reduced savings among consumers will see slowing pace of growth The threat from cheaper alternatives creates a need for innovation and differentiation within premium beauty and personal care Engaging consumers in a new way to spice up the premium experience

#### CATEGORY DATA

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

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2022-2027Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2022-2027

## Mass Beauty and Personal Care in Mexico

#### **KEY DATA FINDINGS**

## 2022 DEVELOPMENTS

L'Oréal plays a key role in driving demand for mass beauty and personal care, utilising e-commerce and social media to engage with consumers Despite post-pandemic return to brick and mortar stores, e-commerce maintains growth momentum Direct sellers face challenges amidst transformation of consumer and the industry

## PROSPECTS AND OPPORTUNITIES

Quality and premium features to drive mass products sales with focus on ingredients and dermocosmetics Continuing to engage digital platforms to reach Mexican consumers Sustainability and social responsibility to gain importance as consumers become more responsible shoppers

## CATEGORY DATA

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

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

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