Beauty and Personal Care in Colombia

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?

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DISCLAIMER

SOURCES

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Baby and Child-Specific Products in Colombia

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2022 DEVELOPMENTS

Inflation and lowering birth rate leads to muted performance
Multinational Johnson & Johnson maintains its lead but loses value share
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PROSPECTS AND OPPORTUNITIES

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Multinationals lead, but local players also have significant presence.

PROSPECTS AND OPPORTUNITIES

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Increasing multifunctional offerings and other added benefits

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Multinationals dominate with wide distribution and constant innovation
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Competitive landscape becoming more consolidated
Increased competition between channels

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Multinationals continue to lead and private label gains value share
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Inflationary pressure boosts private label
Players adopt a more sustainable positioning

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KEY DATA FINDINGS

2022 DEVELOPMENTS
Overall performance muted, though premium men's fragrances shine
Direct sellers have significant foothold.
Attitudes to men's grooming are slowly changing

PROSPECTS AND OPPORTUNITIES
Continued growth of e-commerce
Less essential men's grooming products suffer as long as inflation remains high
Multifunctionality spurred on by high inflation
2022 DEVELOPMENTS
Muted performance in mature product area
Multinationals continue to dominate but private label gains value share
Electric toothbrushes continue to perform strongly

PROSPECTS AND OPPORTUNITIES
Inflationary pressure leads to trading down
Efficiency continues to be a key driver of value sales
Sustainability also key part of messaging

2022 DEVELOPMENTS
Skin care remains buoyant, in particular anti-agers
Direct sellers continue to account for significant value share
Serums increasingly popular

PROSPECTS AND OPPORTUNITIES
Consumers look for sustainability and transparency
Inclusion of natural ingredients, including CBD, increasingly popular.
Shift towards multifunctional products over forecast period
**Sun Care in Colombia**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Sun care star performer in 2022
Leading brand La Roche-Posay gains further value share
Blurring of lines widens consumer base

**PROSPECTS AND OPPORTUNITIES**

Inflationary pressure could lead to trading down
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Brands innovate mainly by offering different formats

**CATEGORY DATA**

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**Premium Beauty and Personal Care in Colombia**

**KEY DATA FINDINGS**

**2022 DEVELOPMENTS**

Premium outperforms mass
Premium sun care and skin care were the best performers in 2022.
Significant growth in dermocosmetics

**PROSPECTS AND OPPORTUNITIES**

Skin care resilience over the forecast
Discounting on premium fragrances supports volume sales
E-commerce gains further value share

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Mass beauty and personal care remains nimble
Direct sellers continue to hold on to significant value share
Mass fragrances register significant fall in volume sales

PROSPECTS AND OPPORTUNITIES

Price discounting and promotions key growth drivers
Increased competition over the forecast period
A more natural approach over the forecast period

CATEGORY DATA

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