Consumer Health in Brazil

EXECUTIVE SUMMARY

Consumer health in 2022: The big picture
New ways of consuming vitamins emerge, and probiotics are highlighted in preventative care
Spin-offs, mergers and acquisitions mark the Brazilian competitive landscape
The advance of pharmacies continues, but could be pressured by the entry of a new distribution channel
Open health, personalisation and logistical issues emerge as important shifts on the horizon

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Analgesics in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS

Headaches, muscle aches and hangovers explain the high consumption of analgesics
Lack of raw materials and supply issues hold back growth, which could have been higher
Acquisitions reinforce Hypera’s portfolio, and Reckitt Benckiser bets on analgesics

PROSPECTS AND OPPORTUNITIES

Inflationary pressure should not harm sales of analgesics in the short term
Multinationals may divest their OTC divisions, while negotiations could form a giant in the national pharmaceutical industry
Expectation of faster-acting products and more flexibility in distribution

CATEGORY DATA

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Sleep Aids in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS

ANVISA authorises melatonin as a food supplement
Leading players launch melatonin versions and traditional herbal brands expand their portfolios
55% of Brazilian middle and upper-middle income consumers monitor sleep through an app or smartwatch

PROSPECTS AND OPPORTUNITIES

High competition with other types of remedies and cheaper alternatives
Melatonin should increase its sales over the forecast period, but at a slower rate
Increased anxiety and depression influence the sleep of adolescents and children

CATEGORY DATA

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Cough, Cold and Allergy (Hay Fever) Remedies in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS

Leading brands are affected by shortages due to unexpected increase in demand
Novelties and television advertising help sales of leading players
New apps encourage e-commerce, but store-based purchases are still favoured by Brazilians

PROSPECTS AND OPPORTUNITIES

Combination products and cough remedies will account for most sales in the coming years
Hypera leads, but could improve its participation in the future
Store-based pharmacies will maintain leadership in distribution in the forecast period, but this may change with regulation in the long term

CATEGORY DATA

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Dermatologicals in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS

Nappy (diaper) rash treatments continues to account for more than half of value sales in dermatologicals
Johnson & Johnson do Brasil leads dermatologicals, mostly due to its Hipoglós brand
Switch in hair loss treatments and discontinuity of brands in antiparasitics/lice (head and body) treatments

PROSPECTS AND OPPORTUNITIES
Demographic changes could affect nappy (diaper) rash treatments in the long term
Growth could be compromised by discontinuation of brands and competition with beauty and personal care products
A closer approach to dermocosmetics could bring benefits to dermatologics

CATEGORY DATA
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Digestive Remedies in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS
Antacids and laxatives represent the highest sales within digestive remedies
Self-indulgence with food and drink during the challenging macroeconomic scenario maintains growth
Hypera holds a strong lead after acquisitions

PROSPECTS AND OPPORTUNITIES
Stress and a diet low in nutrients can cause digestive problems
Consumers’ rising preference for natural ingredients may increase competition with herbal/traditional products in the mid-term
More knowledge about the brain-gut axis and preventative care may reduce demand for digestive remedies in the long term

CATEGORY DATA
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Eye Care in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS
More time on screens causes eye strain and thus greater demand for eye care
Multinationals lead a very concentrated category
The new habit of vitamin consumption by Brazilians demonstrates preventative care

PROSPECTS AND OPPORTUNITIES
Little access by low-income consumers to ophthalmologists, which limits further expansion
Pricing strategies grow in the face of falling incomes
Regulation of optometrists brings favourable prospects for eye care

CATEGORY DATA
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KEY DATA FINDINGS

NRT Smoking Cessation Aids in Brazil

2022 DEVELOPMENTS

NRT patches are favoured by Brazilians
Advent International acquires the leading brand NiQuitin in Brazil and Mexico
Tobacco and poverty: A vicious circle

PROSPECTS AND OPPORTUNITIES

Increases in the search for treatment for nicotine addiction at SUS
Concentration should remain in the forecast period, with competition between Johnson & Johnson and Química y Farmacia
E-cigarettes offer competition to NRT smoking cessation aids

CATEGORY INDICATORS

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Wound Care in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS

On-demand purchase instead of stockpiling leads wound care to continue to struggle
Johnson & Johnson organisational split could move the competitive landscape
Private label pharmacy lines grow as a strategy in wound care

PROSPECTS AND OPPORTUNITIES

Monkeypox may increase demand for gauze
More outdoor sports emerges as a potential way out of the stagnation scenario
In-store sales continue to lead, but click-and-collect increases as a strategy

CATEGORY DATA

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Sports Nutrition in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS
Growth in sports nutrition despite the challenging macroeconomic scenario in 2022
Technology and adoption of healthier habits favour sales of sports nutrition
New launches and distribution in non-traditional channels help increase product penetration

PROSPECTS AND OPPORTUNITIES
Endurance sports favour sales of premium products
Fierce competition with multinational players
Presence in alternative trade fairs guarantees the expansion of sports nutrition

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Dietary Supplements in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS
Probiotic supplements is the big star, in a year marked by slowing growth
Demand for health and beauty intensifies the competitive landscape in collagen
Typical products from Brazil drive growth in herbal/traditional dietary supplements

PROSPECTS AND OPPORTUNITIES
Good outlook for the category, with consumers addressing health more holistically
Functional foods and niche claims expand the competitive landscape
Pharmacies/drugstores as a health space, and the merging of physical and digital

CATEGORY DATA
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Vitamins in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS
Vitamins sees a slowdown in growth, with sales stabilising at a higher level than pre-pandemic
Bayer retains leadership, but pricing and acquisition strategies intensify the competitive landscape
AI brings personalisation and e-commerce gives more visibility to new brands

PROSPECTS AND OPPORTUNITIES
Income and population growth may expand sales of vitamins in the forecast period
National programme encourages vitamin A supplementation, and increase in vegans could boost demand for vitamin B
Vitamins with beauty positioning use the gummy format to gain traction

CATEGORY DATA
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Weight Management and Wellbeing in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS
Supplement nutrition drinks drives growth
Expansion of the target audience moves the competitive landscape in supplement nutrition drinks
Pharmacies and drugstores see growth in distribution

PROSPECTS AND OPPORTUNITIES
Healthy habits and tighter budgets reduce demand for meal replacement products and slimming teas
Supplement nutrition drinks to remain the strongest performer for demographic reasons and expansion of consumer base
Pharmacies and drugstores use digital health apps to supplement weight management products

CATEGORY DATA
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Herbal/Traditional Products in Brazil

KEY DATA FINDINGS

2022 DEVELOPMENTS
Consumers prefer to treat coughs, colds and allergies with non-herbal products
Hypera SA dominates herbal/traditional digestive remedies
Specialised shops and small local grocers compete with pharmacies

PROSPECTS AND OPPORTUNITIES
Herbal/traditional products has growth prospects in the forecast period, but competition with standard OTC products will continue in the short term
New regulation could give greater credibility and move the competitive landscape
Pharmacies could strengthen their position with e-commerce expansion and customer centricity

CATEGORY DATA
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Paediatric Consumer Health in Brazil

KEY DATA FINDINGS
2022 DEVELOPMENTS
In-person schooling puts children on the frontline of the cold and flu season and more parents turn to OTC solutions
Nappy (diaper) rash treatments remains popular, while paediatric vitamins and dietary supplements declines after boom
Licensing and new formats as strategies in an increasingly competitive landscape

PROSPECTS AND OPPORTUNITIES
Herbal/traditional products for children emerge due to natural trend
More screen time may increase the need for paediatric products
The creation of platforms and communication channels to transmit credibility and generate a sense of belonging

CATEGORY DATA
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