

# Beauty and Personal Care in Chile

May 2022

Table of Contents

## Beauty and Personal Care in Chile

### EXECUTIVE SUMMARY

Beauty and personal care in 2021: The big picture

2021 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

Chart 1 - Beauty and Personal Care Value Sales Growth Scenarios: 2019-2026

Chart 2 - Beauty and Personal Care Impact of Soft Drivers on Value Sales: 2019-2026

### MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2016-2021

Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2016-2021

Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2017-2021

Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2017-2021

Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2018-2021

Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2016-2021

Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2016-2021

Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2021

Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2021-2026

Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2021-2026

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Mass Beauty and Personal Care in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Growth driven by monetary liquidity in 2021 as a result of cash withdrawals from the pension system and subsidies from the government

Significant increase in sales in dermocosmetics within mass segment, especially in skin care and sun care

Department stores and beauty specialists recover some space as sales channels

### PROSPECTS AND OPPORTUNITIES

Opportunity for private label to gain ground due to trend of larger packaging formats

E-commerce to consolidate position as crucial distribution channel for players

Innovative and sustainable products can add dynamism to mature categories

### CATEGORY DATA

Table 11 - Sales of Mass Beauty and Personal Care by Category: Value 2016-2021

Table 12 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2016-2021

Table 13 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2017-2021

Table 14 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2018-2021

Table 15 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2021-2026

Table 16 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2021-2026

## Premium Beauty and Personal Care in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Premium fragrances records highest growth in beauty and personal care

L'Oréal leads premium beauty and personal care supported by e-commerce and advantageous position in department stores

Premium brands benefit from excess financial liquidity generated by government subsidies and successive withdrawals from the pension system

## PROSPECTS AND OPPORTUNITIES

Premium brands to target omnichannel strategy

Companies continue to focus on quality and customer service

E-commerce growth proves to be useful tool to attract consumers

## CATEGORY DATA

Table 17 - Sales of Premium Beauty and Personal Care by Category: Value 2016-2021

Table 18 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2016-2021

Table 19 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2017-2021

Table 20 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2018-2021

Table 21 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2021-2026

Table 22 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2021-2026

## Baby and Child-Specific Products in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Demand for baby and child-specific products driven by excess monetary liquidity in 2021

Sun care and skin care record fastest growth, supported by the momentum of dermocosmetics

### PROSPECTS AND OPPORTUNITIES

Further potential for dermocosmetics

E-commerce to consolidate its position as an important emerging channel in Chile

Discounting and bundle promotions to remain popular in baby and child-specific sun care and skin care

## CATEGORY DATA

Table 23 - Sales of Baby and Child-specific Products by Category: Value 2016-2021

Table 24 - Sales of Baby and Child-specific Products by Category: % Value Growth 2016-2021

Table 25 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2016-2021

Table 26 - NBO Company Shares of Baby and Child-specific Products: % Value 2017-2021

Table 27 - LBN Brand Shares of Baby and Child-specific Products: % Value 2018-2021

Table 28 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2018-2021

Table 29 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2018-2021

Table 30 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2018-2021

Table 31 - Forecast Sales of Baby and Child-specific Products by Category: Value 2021-2026

Table 32 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2021-2026

Table 33 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2021-2026

## Bath and Shower in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Sales continue to grow in 2021, driven by higher consumer disposable incomes, despite some slowing of demand in second half of the year

New lifestyle trends focus on hygiene, with further potential in the future

Unilever retains convincing leadership due to wide distribution and price competition in 2021

### PROSPECTS AND OPPORTUNITIES

Environmental consciousness to continue to shape purchasing decisions

Pricing strategies and promoting private label will be increasingly used by companies and large retailers to improve their positions in the category

Improvement in e-commerce and last mile services to drive greater dynamism in retail

## CATEGORY DATA

Table 34 - Sales of Bath and Shower by Category: Value 2016-2021

Table 35 - Sales of Bath and Shower by Category: % Value Growth 2016-2021

Table 36 - Sales of Bath and Shower by Premium vs Mass: % Value 2016-2021

Table 37 - NBO Company Shares of Bath and Shower: % Value 2017-2021

Table 38 - LBN Brand Shares of Bath and Shower: % Value 2018-2021

Table 39 - LBN Brand Shares of Premium Bath and Shower: % Value 2018-2021

Table 40 - Forecast Sales of Bath and Shower by Category: Value 2021-2026

Table 41 - Forecast Sales of Bath and Shower by Category: % Value Growth 2021-2026

Table 42 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2021-2026

## Colour Cosmetics in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Colour cosmetics achieves significant value growth in 2021, far exceeding 2019 sales, driven by access to financial liquidity and reopening of physical non-essential channels

Premium brands stand out in their campaigns to attract customers, achieving important share gain

L'Oréal launches its first cosmetic packaging that reduces plastic use by 45% and includes certified cardboard

### PROSPECTS AND OPPORTUNITIES

Companies to continue with innovative proposals and trends

Online growth evidence that e-commerce can be a useful tool to attract consumers

Rise of dermocosmetics within the category

## CATEGORY DATA

Table 43 - Sales of Colour Cosmetics by Category: Value 2016-2021

Table 44 - Sales of Colour Cosmetics by Category: % Value Growth 2016-2021

Table 45 - NBO Company Shares of Colour Cosmetics: % Value 2017-2021

Table 46 - LBN Brand Shares of Colour Cosmetics: % Value 2018-2021

Table 47 - LBN Brand Shares of Eye Make-up: % Value 2018-2021

Table 48 - LBN Brand Shares of Facial Make-up: % Value 2018-2021

Table 49 - LBN Brand Shares of Lip Products: % Value 2018-2021

Table 50 - LBN Brand Shares of Nail Products: % Value 2018-2021

Table 51 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2018-2021

Table 52 - Forecast Sales of Colour Cosmetics by Category: Value 2021-2026

Table 53 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2021-2026

## Deodorants in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Demand for deodorants marginally improves in 2021 due to greater mobility outside of the home, but remains below pre-pandemic levels

Dermocosmetics energises category

Unilever retains its leadership of deodorants in 2021

### PROSPECTS AND OPPORTUNITIES

Dermocosmetics within category offers further growth potential

Potential for sustainable products

Innovation can drive up dynamism within deodorants following stagnation

## CATEGORY DATA

Table 54 - Sales of Deodorants by Category: Value 2016-2021

Table 55 - Sales of Deodorants by Category: % Value Growth 2016-2021

Table 56 - Sales of Deodorants by Premium vs Mass: % Value 2016-2021

Table 57 - NBO Company Shares of Deodorants: % Value 2017-2021

Table 58 - LBN Brand Shares of Deodorants: % Value 2018-2021

Table 59 - LBN Brand Shares of Premium Deodorants: % Value 2018-2021

Table 60 - Forecast Sales of Deodorants by Category: Value 2021-2026

Table 61 - Forecast Sales of Deodorants by Category: % Value Growth 2021-2026

Table 62 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2021-2026

## Depilatories in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Demand for depilatories significantly improves in 2021 in line with greater mobility outside of the home

Procter & Gamble strengthens lead in 2021, although Reckitt Benckiser, Eveready and Cosmética Nacional are important competitors

Emergence of e-commerce presents opportunity for the massification of depilatories

### PROSPECTS AND OPPORTUNITIES

Interest in hair removers/bleaches with skin care benefits provides opportunity for expansion

Modern grocery retailers and beauty specialists to remain most popular distribution channels for depilatories

Innovation and sustainability are key elements to drive up value growth

## CATEGORY DATA

Table 63 - Sales of Depilatories by Category: Value 2016-2021

Table 64 - Sales of Depilatories by Category: % Value Growth 2016-2021

Table 65 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2017-2021

Table 66 - NBO Company Shares of Depilatories: % Value 2017-2021

Table 67 - LBN Brand Shares of Depilatories: % Value 2018-2021

Table 68 - Forecast Sales of Depilatories by Category: Value 2021-2026

Table 69 - Forecast Sales of Depilatories by Category: % Value Growth 2021-2026

## Fragrances in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Fragrances records remarkable growth in 2021, supported by financial liquidity and greater mobility

Premium brands stand out in their campaigns to attract customers, achieving important migration towards higher-priced products

Puig retains slim lead in 2021 in the face of increasing competition from L'Oréal, supported by latter's strong performance in premium segment

### PROSPECTS AND OPPORTUNITIES

E-commerce to consolidate its importance as a distribution channel for fragrances

Political and economic uncertainty heading into 2022 may impact demand

Possibility of lower disposable incomes in 2022 will offer opportunities to emerging brands and private label

## CATEGORY DATA

Table 70 - Sales of Fragrances by Category: Value 2016-2021

Table 71 - Sales of Fragrances by Category: % Value Growth 2016-2021

Table 72 - NBO Company Shares of Fragrances: % Value 2017-2021

Table 73 - LBN Brand Shares of Fragrances: % Value 2018-2021

Table 74 - LBN Brand Shares of Premium Men's Fragrances: % Value 2018-2021

Table 75 - LBN Brand Shares of Premium Women's Fragrances: % Value 2018-2021

Table 76 - Forecast Sales of Fragrances by Category: Value 2021-2026

Table 77 - Forecast Sales of Fragrances by Category: % Value Growth 2021-2026

## Hair Care in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Hair care achieves significant growth in 2021, with standard shampoos, and conditioners and treatments particularly strong performers

Modern grocery retailers remains most important distribution channel in 2021

L'Oréal, Unilever and Procter & Gamble compete closely for leadership of hair care

#### PROSPECTS AND OPPORTUNITIES

New opportunities with the rise of e-commerce

Despite gradual return to normality, many home treatment routines will remain relevant

Innovation and differentiation key elements to continue expanding hair care

#### CATEGORY DATA

Table 78 - Sales of Hair Care by Category: Value 2016-2021

Table 79 - Sales of Hair Care by Category: % Value Growth 2016-2021

Table 80 - Sales of Hair Care by Premium vs Mass: % Value 2016-2021

Table 81 - NBO Company Shares of Hair Care: % Value 2017-2021

Table 82 - NBO Company Shares of Salon Professional Hair Care: % Value 2017-2021

Table 83 - LBN Brand Shares of Hair Care: % Value 2018-2021

Table 84 - LBN Brand Shares of Colourants: % Value 2018-2021

Table 85 - LBN Brand Shares of Salon Professional Hair Care: % Value 2018-2021

Table 86 - LBN Brand Shares of Styling Agents: % Value 2018-2021

Table 87 - LBN Brand Shares of Premium Hair Care: % Value 2018-2021

Table 88 - Forecast Sales of Hair Care by Category: Value 2021-2026

Table 89 - Forecast Sales of Hair Care by Category: % Value Growth 2021-2026

Table 90 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2021-2026

## Men's Grooming in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Men's grooming registers high growth in 2021, with premium men's fragrances a particularly dynamic performer

Chileans males are increasingly interested in men's grooming products

Unilever retains leadership but L'Oréal makes notable gains due to sales of premium men's fragrances

#### PROSPECTS AND OPPORTUNITIES

Changing society will encourage males to continue exploring men's grooming in the coming years

Companies must continue to promote quality and sustainable products

E-commerce to consolidate position as a key distribution channel for players

#### CATEGORY DATA

Table 91 - Sales of Men's Grooming by Category: Value 2016-2021

Table 92 - Sales of Men's Grooming by Category: % Value Growth 2016-2021

Table 93 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2018-2021

Table 94 - Sales of Men's Skin Care by Type: % Value Breakdown 2018-2021

Table 95 - NBO Company Shares of Men's Grooming: % Value 2017-2021

Table 96 - LBN Brand Shares of Men's Grooming: % Value 2018-2021

Table 97 - LBN Brand Shares of Men's Razors and Blades: % Value 2018-2021

Table 98 - Forecast Sales of Men's Grooming by Category: Value 2021-2026

Table 99 - Forecast Sales of Men's Grooming by Category: % Value Growth 2021-2026

## Oral Care in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Oral care benefits from access to financial liquidity in 2021

Colgate launches first 100% recyclable toothpaste tube

Colgate-Palmolive maintains lead in 2021 due to new naturally-positioned product development

#### PROSPECTS AND OPPORTUNITIES

Vegan/free-from options to remain growing niche in Chile

Promotions, discounts and innovation to attract consumers

Modern grocery retailers led by supermarkets and hypermarkets to remain leading distribution channel for oral care

#### CATEGORY DATA

Table 100 - Sales of Oral Care by Category: Value 2016-2021

Table 101 - Sales of Oral Care by Category: % Value Growth 2016-2021

Table 102 - Sales of Toothbrushes by Category: Value 2016-2021

Table 103 - Sales of Toothbrushes by Category: % Value Growth 2016-2021

Table 104 - Sales of Toothpaste by Type: % Value Breakdown 2017-2021

Table 105 - NBO Company Shares of Oral Care: % Value 2017-2021

Table 106 - LBN Brand Shares of Oral Care: % Value 2018-2021

Table 107 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2018-2021

Table 108 - LBN Brand Shares of Toothpaste: % Value 2018-2021

Table 109 - Forecast Sales of Oral Care by Category: Value 2021-2026

Table 110 - Forecast Sales of Oral Care by Category: % Value Growth 2021-2026

Table 111 - Forecast Sales of Toothbrushes by Category: Value 2021-2026

Table 112 - Forecast Sales of Toothbrushes by Category: % Value Growth 2021-2026

## Skin Care in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Skin care records significant growth in 2021, driven by premium brands

Dermocosmetics is dynamic performer, with consumers willing to pay more for proven efficacy

L'Oréal extends lead by capitalising on dermocosmetics in 2021 and migration to premium brands

#### PROSPECTS AND OPPORTUNITIES

E-commerce and omnichannel approach to allow players to have a distinct advantage over competitors

Increasingly sophisticated consumers

Innovative and sustainable products to become booming trend in Chilean skin care

#### CATEGORY DATA

Table 113 - Sales of Skin Care by Category: Value 2016-2021

Table 114 - Sales of Skin Care by Category: % Value Growth 2016-2021

Table 115 - NBO Company Shares of Skin Care: % Value 2017-2021

Table 116 - LBN Brand Shares of Skin Care: % Value 2018-2021

Table 117 - LBN Brand Shares of Basic Moisturisers: % Value 2018-2021

Table 118 - LBN Brand Shares of Anti-agers: % Value 2018-2021

Table 119 - LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2018-2021

Table 120 - LBN Brand Shares of General Purpose Body Care: % Value 2018-2021

Table 121 - LBN Brand Shares of Premium Skin Care: % Value 2018-2021

Table 122 - Forecast Sales of Skin Care by Category: Value 2021-2026

Table 123 - Forecast Sales of Skin Care by Category: % Value Growth 2021-2026

## Sun Care in Chile

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Sun care has outstanding year supported by fewer restrictions and greater mobility

Dermocosmetics perform well in 2021, with claims of superior results

L'Oréal increases its advantage as leader in 2021, supported by dermocosmetics brands

#### PROSPECTS AND OPPORTUNITIES

Growth trend of natural and sustainable products is expected to continue

Modern grocery retailers to consolidate position as alternative distribution channel for sun care

Innovation, promotions and discounts will continue to be key elements for success

#### CATEGORY DATA

Table 124 - Sales of Sun Care by Category: Value 2016-2021

Table 125 - Sales of Sun Care by Category: % Value Growth 2016-2021

Table 126 - NBO Company Shares of Sun Care: % Value 2017-2021

Table 127 - LBN Brand Shares of Sun Care: % Value 2018-2021

Table 128 - LBN Brand Shares of Premium Adult Sun Care: % Value 2018-2021

Table 129 - Forecast Sales of Sun Care by Category: Value 2021-2026

Table 130 - Forecast Sales of Sun Care by Category: % Value Growth 2021-2026

## 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-chile/report](http://www.euromonitor.com/beauty-and-personal-care-in-chile/report).