



Euromonitor
International

Rx/Reimbursement Adult Incontinence in Brazil

April 2026

Table of Contents

Rx/Reimbursement Adult Incontinence in Brazil - Category analysis

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Farmácia Popular Expansion Drives Volume-Led Growth

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Rx/Reimbursement Adult Incontinence

INDUSTRY PERFORMANCE

Farmácia Popular Expansion Drives Volume-Led Growth

Chart 2 - Farmácia Popular Expands Free Adult Incontinence Supplies Under Health System SUS in 2025

Bigfral'S Inclusive Approach Boosts Access and Improves Patient Fit

Chart 3 - Bigfral Expands Size-Inclusive Adult Incontinence Portfolio Supplied Via Reimbursed Pharmacies

Chart 4 - Value Sales 2020-2030

Chart 5 - Volume Sales 2020-2030

WHAT'S NEXT?

Continued Dynamism as the Population Ages and the Consumer Base Expands

Performance Will Be Linked to Public Policy Decisions

Pharmacy Networks to Strengthen Access and Drive Supplier Strategies

Chart 6 - Forecast Value Sales 2020-2030

ECONOMIC CONTEXT

Chart 7 - Economic Context for Rx/Reimbursement Adult Incontinence

Chart 8 - Real Gdp Growth 2020-2030

Chart 9 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 10 - Consumer Context for Rx/Reimbursement Adult Incontinence

Chart 11 - Population 2020-2030

Chart 12 - Consumer Expenditure 2020-2030

Chart 13 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Tissue and Hygiene in Brazil - Industry Overview](#)

EXECUTIVE SUMMARY

Bracell Expands Affordable Tissue Lines to Capture Price-Sensitive Shoppers

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 14 - Key Industry Trends for Tissue and Hygiene

INDUSTRY PERFORMANCE

Bracell Expands Affordable Tissue Lines to Capture Price-Sensitive Shoppers

Chart 15 - Bracell Amplifies its Presence with Affordable Toilet Paper, Focusing on Cost-Benefit Ratio

Retail Tissue Maintains Lead as Bulk Formats and Value Brands Drive Volumes

Always Launches Pocket Flexfoam to Drive Convenience-Led Premium Growth

Chart 16 - Always Launches Pocket Flexfoam to Offer Compact Convenience in Menstrual Care

Dermacyd Targets Clean Wellness with Ph-Balanced Intimate Wipes

Chart 17 - Dermacyd launches Neutralize intimate wipes with pH-balanced Odor Control technology

Chart 18 - Value Sales 2020-2030

Chart 19 - Value Sales by Category 2025

WHAT'S NEXT?

Adult Incontinence Providers to Leverage the Ageing Population to Drive Adoption

Value Brands to Remain Significant Due to Persistent Price Sensitivity

Chart 20 - Analyst Insight for Tissue and Hygiene

Omnichannel Strategies and Monitoring and Adapting to Regulations Will Be Important for Companies

Chart 21 - Forecast Value Sales 2020-2030

Chart 22 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Kimberly-Clark Maintains Its Lead, but the Competition Rises in the Value Segment

Softys' Acquisition of Ontex's Brazilian Business Impacts Tissue and Hygiene

Aggressive Expansion Positions Bracell as a Major Challenger

Chart 23 - Company Shares 2025

Chart 24 - Brand Shares 2025

CHANNELS

Health and Beauty Specialists Captures Hygiene Sales as Shoppers Seek Advice and Chains Expand

Retail E-Commerce Gains Ground for Premium and Bulk Products, but Rises From a Low Base

Chart 25 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 26 - Economic Context for Tissue and Hygiene

Chart 27 - Real Gdp Growth 2020-2030

Chart 28 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 29 - Consumer Context for Tissue and Hygiene

Chart 30 - Population 2020-2030

Chart 31 - Consumer Expenditure 2020-2030

Chart 32 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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.

