



Passport

Deodorants in Brazil

Euromonitor International

July 2024

This sample report is for illustration
purposes only.

Some content and data have been
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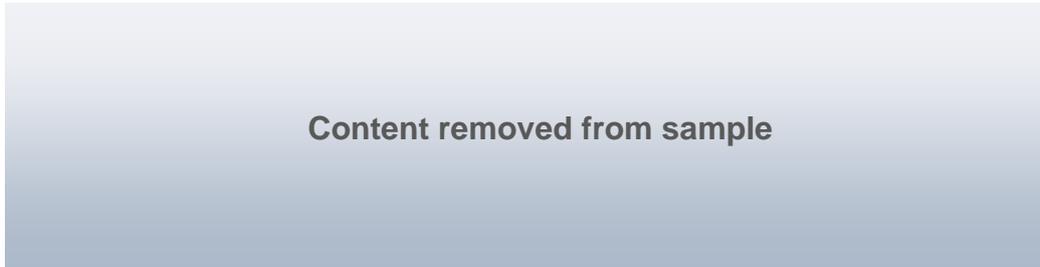
LIST OF CONTENTS AND TABLES

Deodorants in Brazil - Category Analysis	1
KEY DATA FINDINGS.....	1
2023 DEVELOPMENTS.....	1
Rising temperatures and new usage occasions drive double-digit value growth for deodorants1	
Body splashes and newcomers shake up the deodorants category	2
Premiumisation process opens up space for retail e-commerce to advance	2
PROSPECTS AND OPPORTUNITIES.....	3
Deodorant sprays expected to remain the main format in the market, although deodorant sticks and pumps set to advance at a faster pace	3
Synergy with a healthy lifestyle and the practice of sports will continue to boost sales of deodorants.....	4
New brands and products will drive e-commerce growth, but pharmacies and grocery retailers will continue to account for the highest shares of sales	4
CATEGORY DATA.....	5
Table 1 Sales of Deodorants by Category: Value 2018-2023	5
Table 2 Sales of Deodorants by Category: % Value Growth 2018-2023.....	5
Table 3 Sales of Deodorants by Premium vs Mass: % Value 2018-2023	5
Table 4 NBO Company Shares of Deodorants: % Value 2019-2023	6
Table 5 LBN Brand Shares of Deodorants: % Value 2020-2023.....	6
Table 6 LBN Brand Shares of Premium Deodorants: % Value 2020-2023	7
Table 7 Forecast Sales of Deodorants by Category: Value 2023-2028	8
Table 8 Forecast Sales of Deodorants by Category: % Value Growth 2023-2028	8
Table 9 Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028	8
Beauty and Personal Care in Brazil - Industry Overview	9
EXECUTIVE SUMMARY.....	9
Beauty and personal care in 2023: The big picture	9
2023 key trends	10
Competitive landscape	11
Retailing developments	12
What next for beauty and personal care?	13
MARKET DATA.....	14
Table 10 Sales of Beauty and Personal Care by Category: Value 2018-2023.....	14
Table 11 Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023	15
Table 12 GBO Company Shares of Beauty and Personal Care: % Value 2019-2023	15
Table 13 NBO Company Shares of Beauty and Personal Care: % Value 2019-2023	16
Table 14 LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023	17
Table 15 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023	19
Table 16 Distribution of Beauty and Personal Care by Format: % Value 2018-2023	19

Table 17	Distribution of Beauty and Personal Care by Format and Category: % Value 2023.....	20
Table 18	Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028.....	22
Table 19	Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028	22
DISCLAIMER		23
SOURCES.....		23
Summary 1	Research Sources.....	23

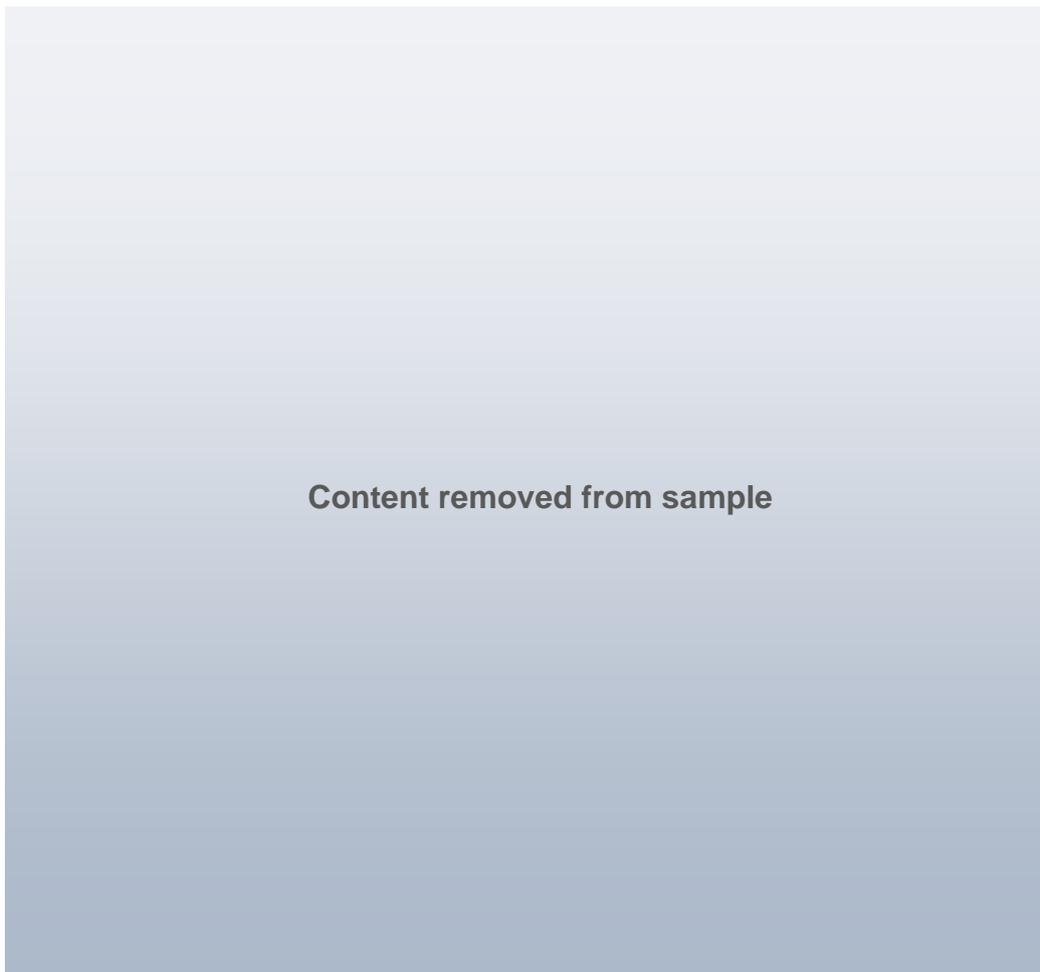
DEODORANTS IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS



2023 DEVELOPMENTS

Rising temperatures and new usage occasions drive double-digit value growth for deodorants



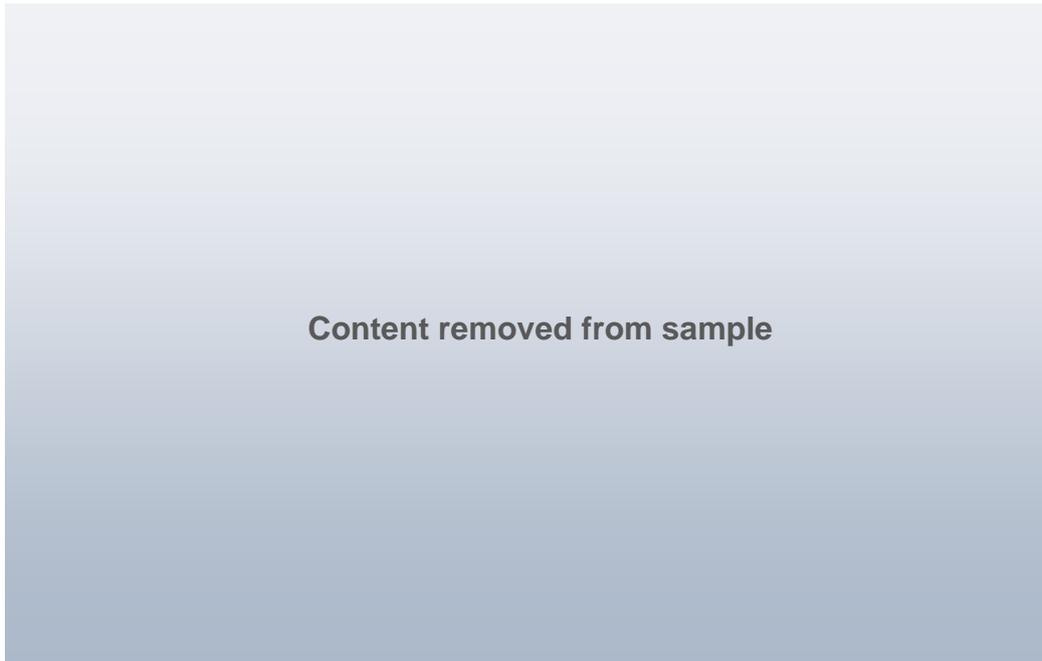
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Body splashes and newcomers shake up the deodorants category

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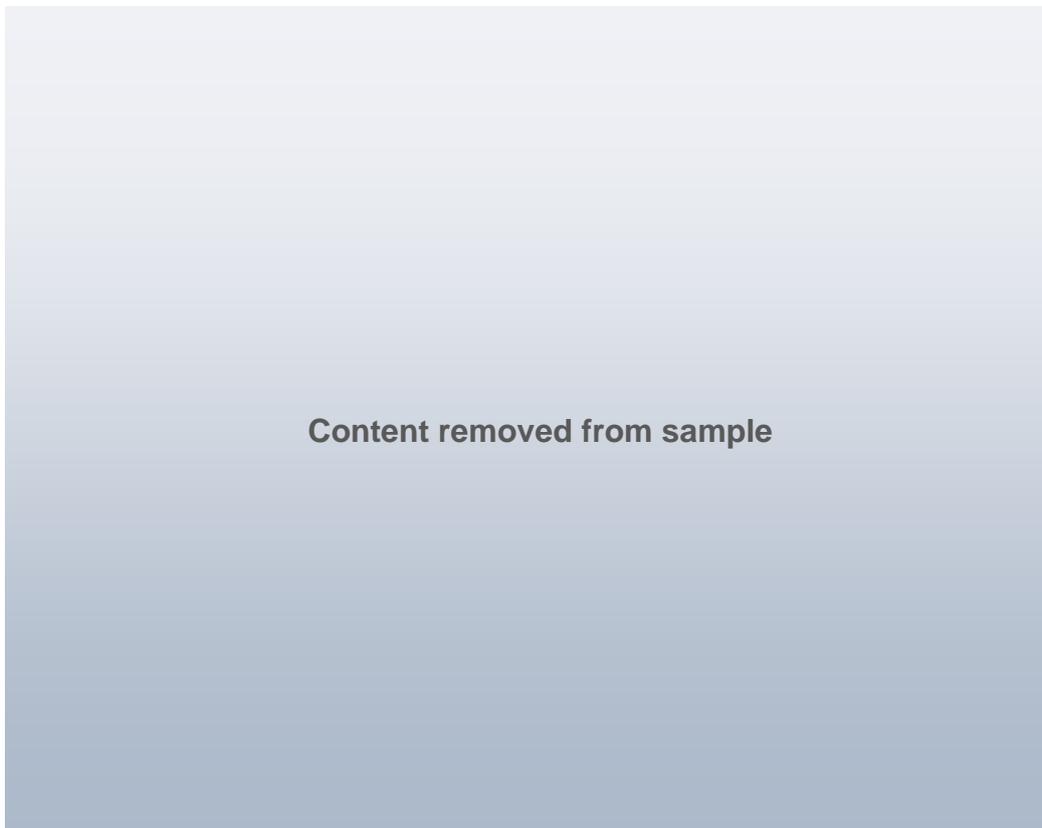
Premiumisation process opens up space for retail e-commerce to advance

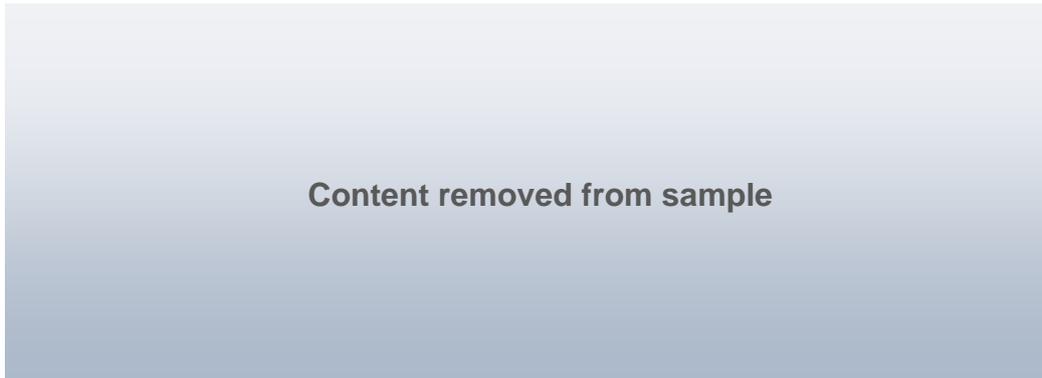
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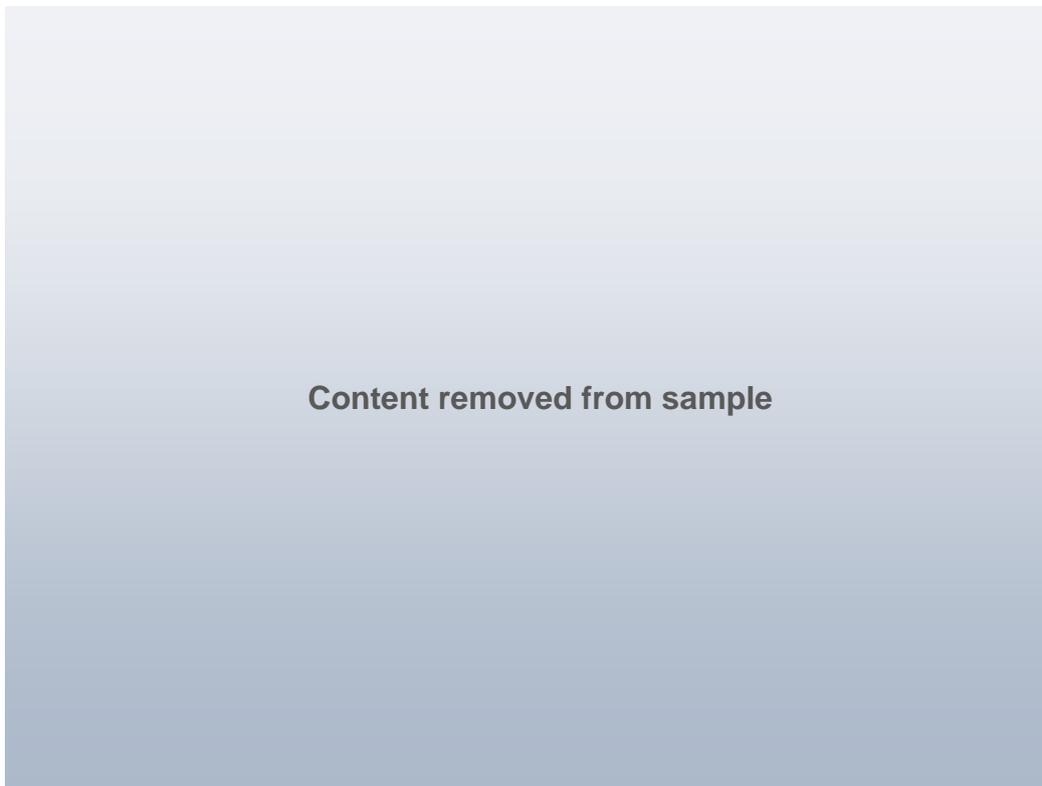
PROSPECTS AND OPPORTUNITIES

Deodorant sprays expected to remain the main format in the market, although deodorant sticks and pumps set to advance at a faster pace

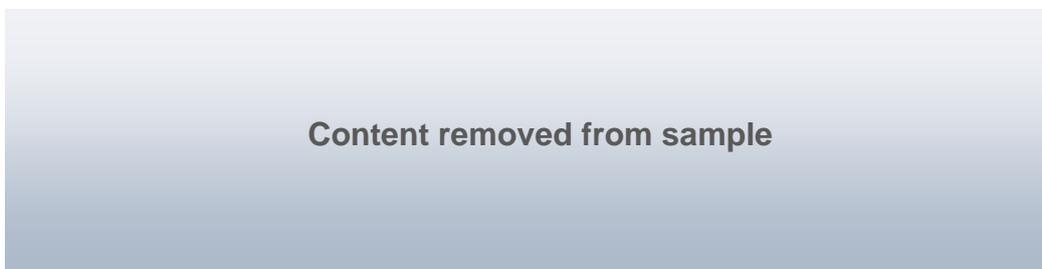


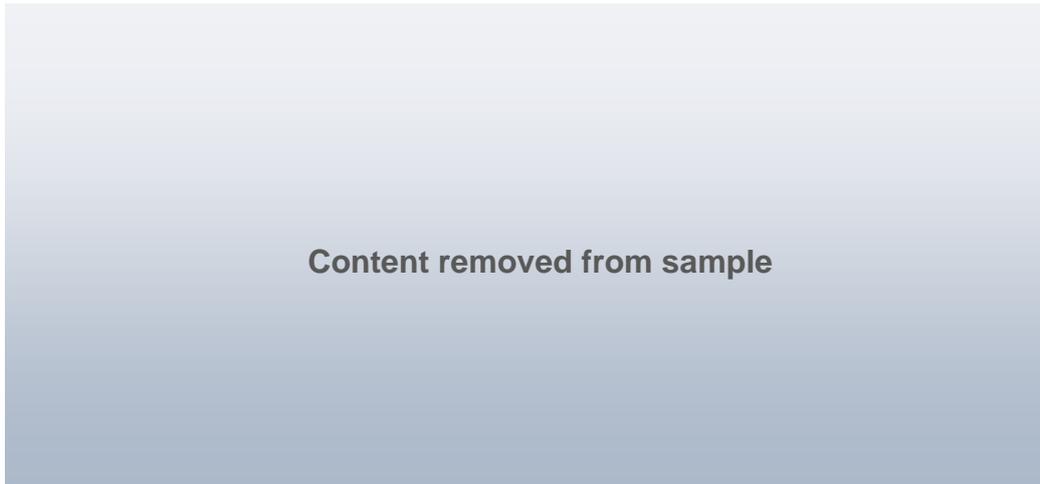


Synergy with a healthy lifestyle and the practice of sports will continue to boost sales of deodorants



New brands and products will drive e-commerce growth, but pharmacies and grocery retailers will continue to account for the highest shares of sales





CATEGORY DATA

Table 1 Sales of Deodorants by Category: Value 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
Deodorants	D Data removed from sample					
Deodorant Creams						
Deodorant Pumps						
Deodorant Roll-Ons						
Deodorant Sprays						
Deodorant Sticks						
Deodorant Wipes						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Deodorants by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Deodorants	Data removed from sample		
Deodorant Creams			
Deodorant Pumps			
Deodorant Roll-Ons			
Deodorant Sprays			
Deodorant Sticks			
Deodorant Wipes			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Deodorants by Premium vs Mass: % Value 2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
--------------------	------	------	------	------	------	------

Premium
Mass
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 NBO Company Shares of Deodorants: % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
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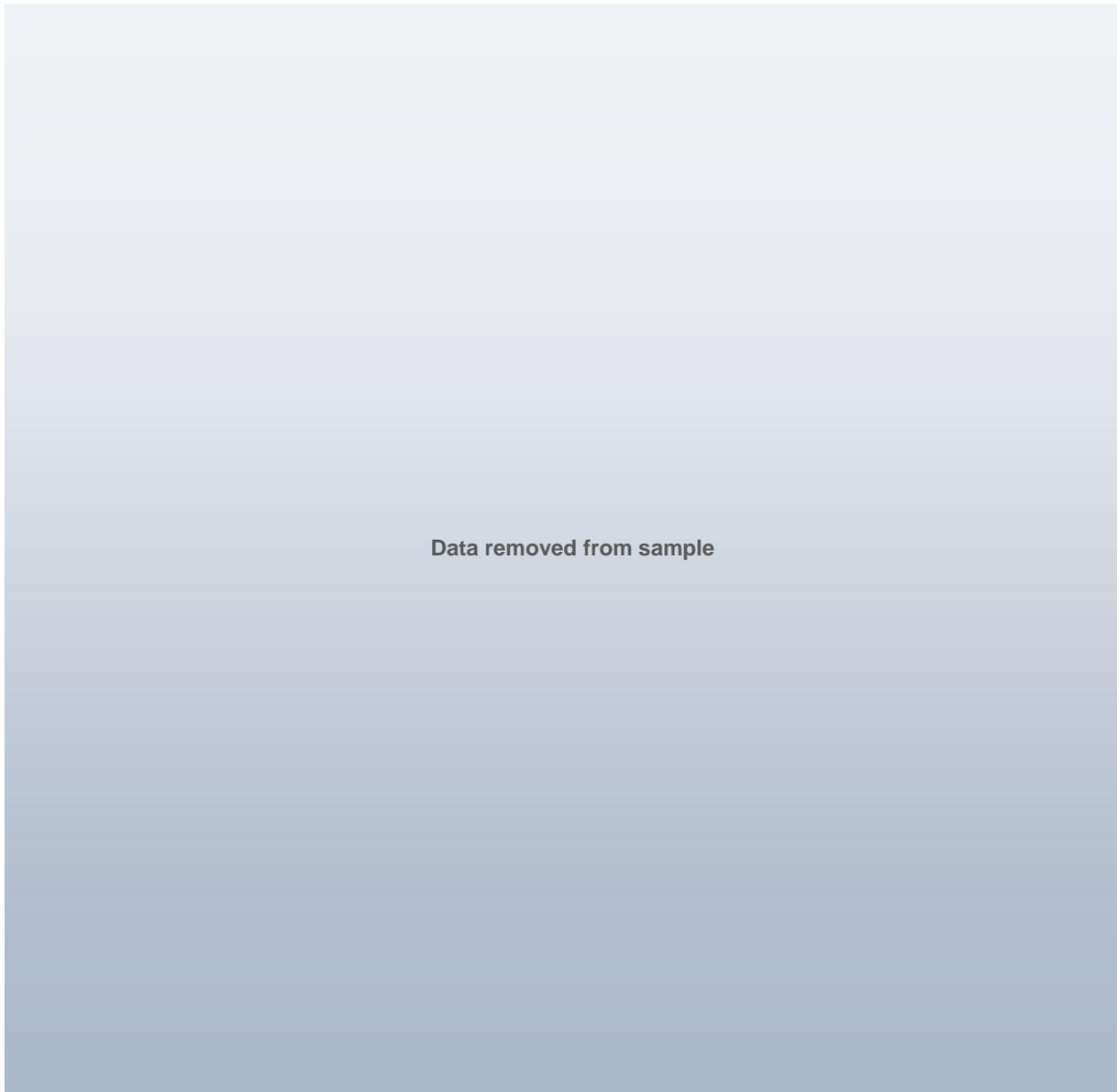
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 LBN Brand Shares of Deodorants: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
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Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Premium Deodorants: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Forecast Sales of Deodorants by Category: Value 2023-2028

BRL million	2023	2024	2025	2026	2027	2028
Deodorants	Data removed from sample					
Deodorant Creams						
Deodorant Pumps						
Deodorant Roll-Ons						
Deodorant Sprays						
Deodorant Sticks						
Deodorant Wipes						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 8 Forecast Sales of Deodorants by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Deodorants	Data removed from sample		
Deodorant Creams			
Deodorant Pumps			
Deodorant Roll-Ons			
Deodorant Sprays			
Deodorant Sticks			
Deodorant Wipes			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

% retail value rsp	2023	2024	2025	2026	2027	2028
Premium	Data removed from sample					
Mass						
Total						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

BEAUTY AND PERSONAL CARE IN BRAZIL - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

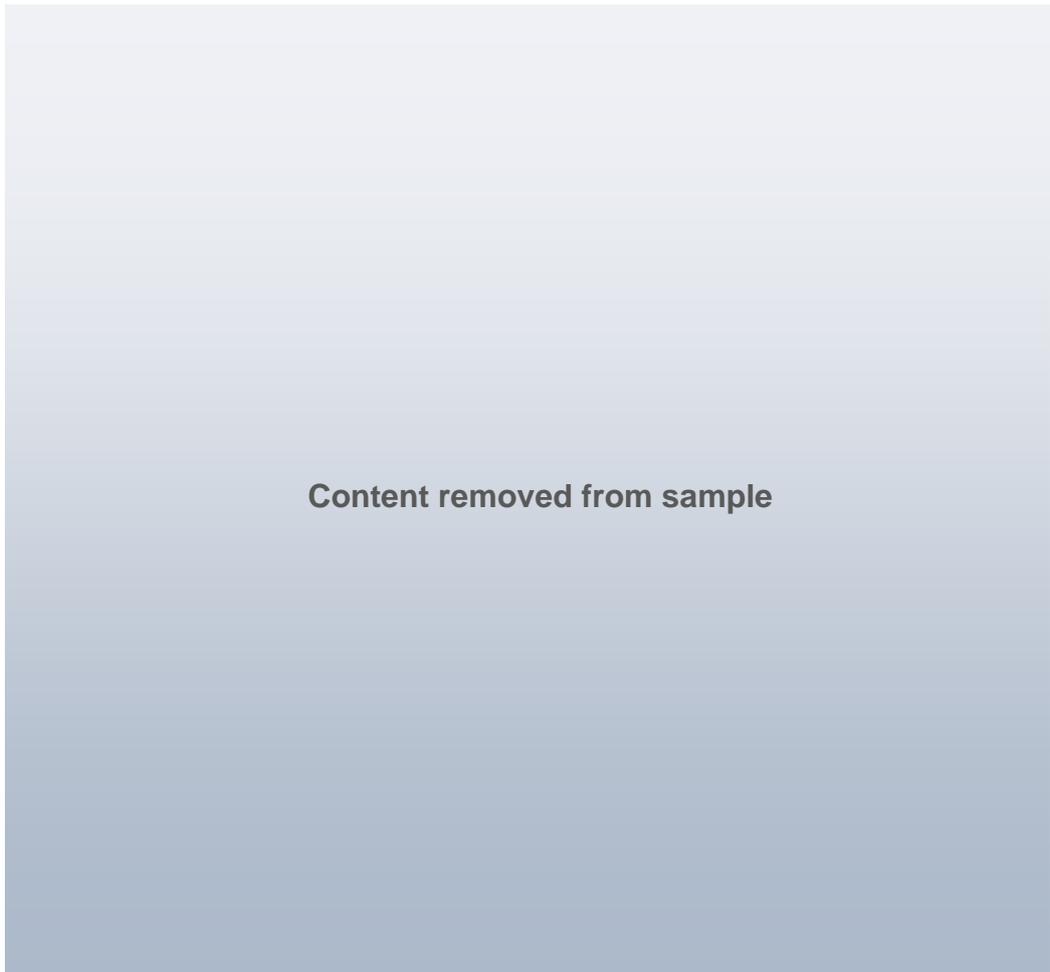
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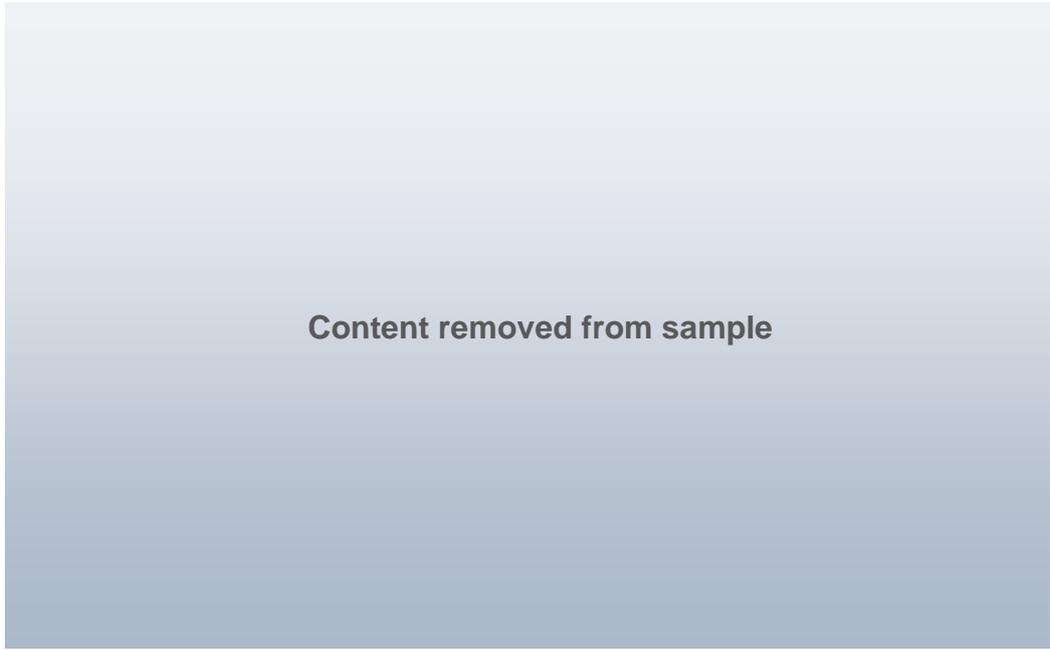
2023 key trends

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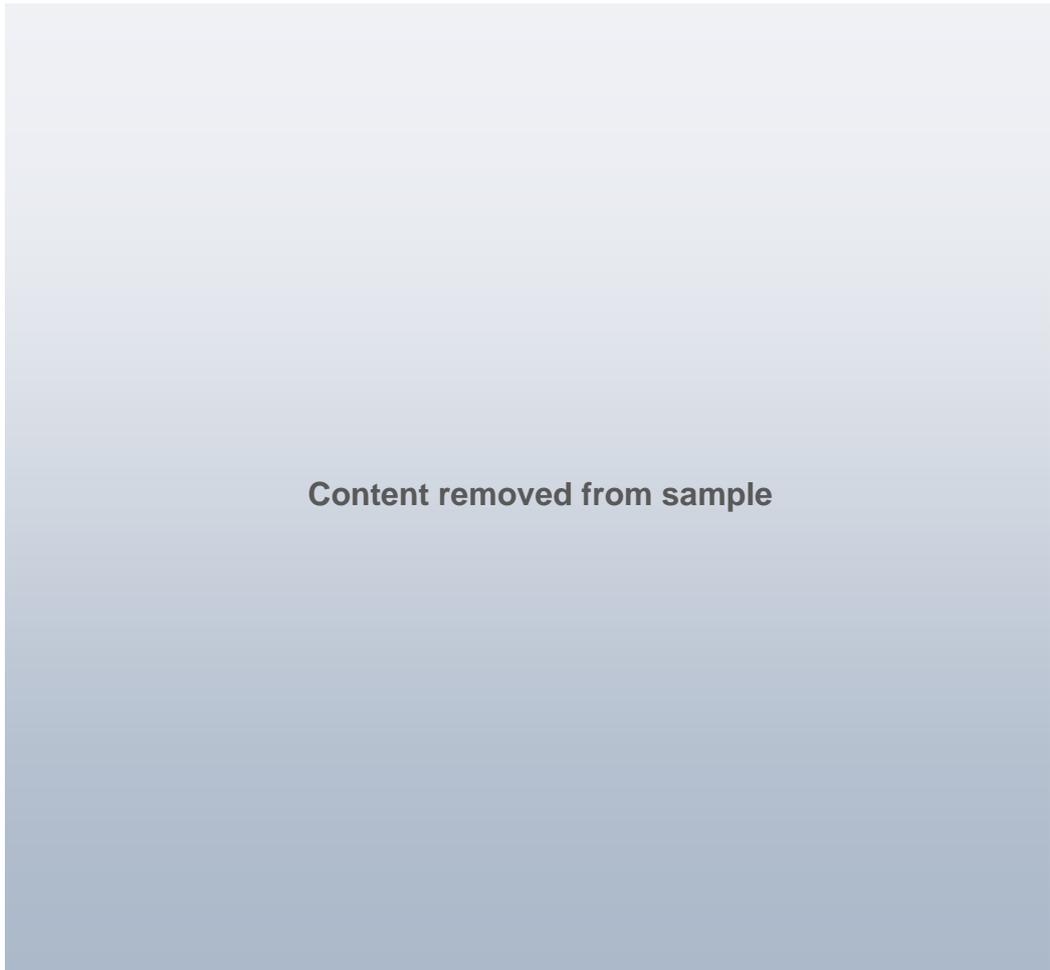


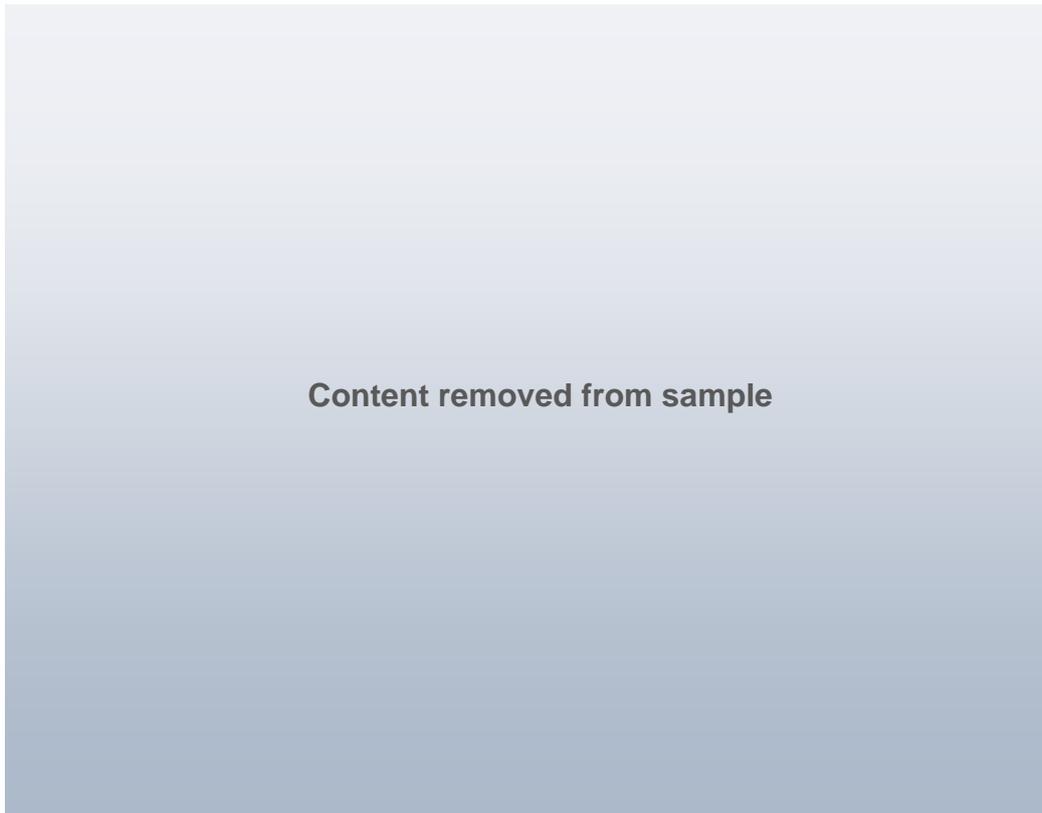
Competitive landscape



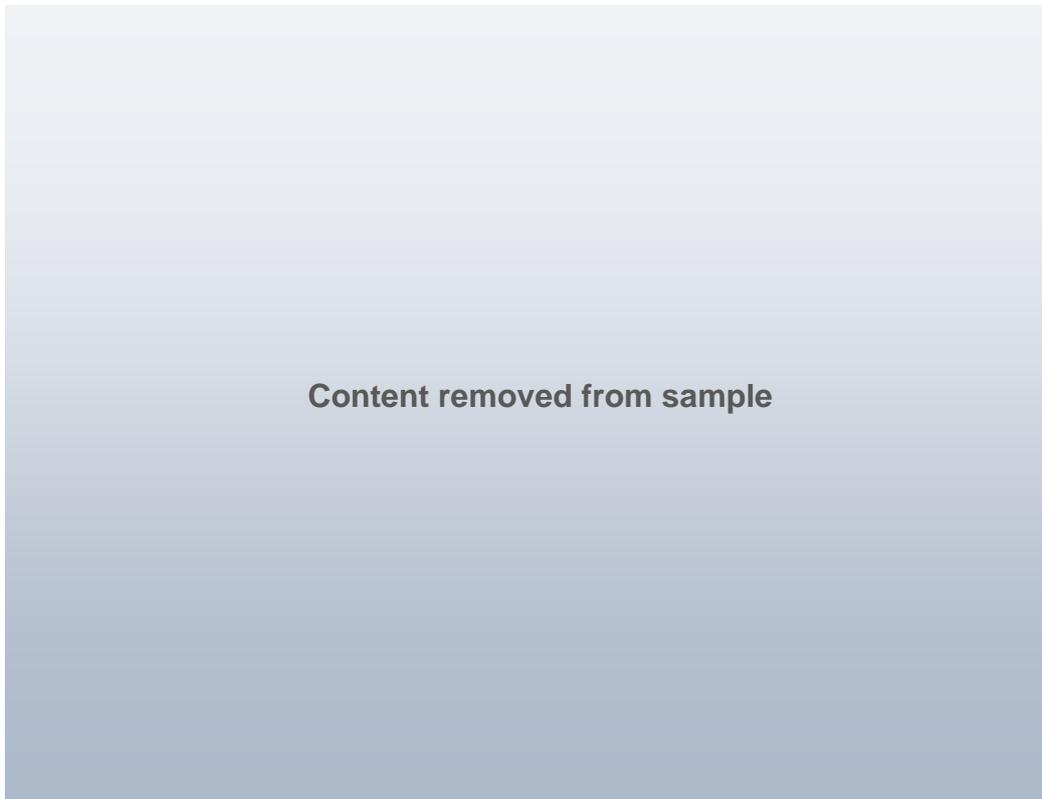


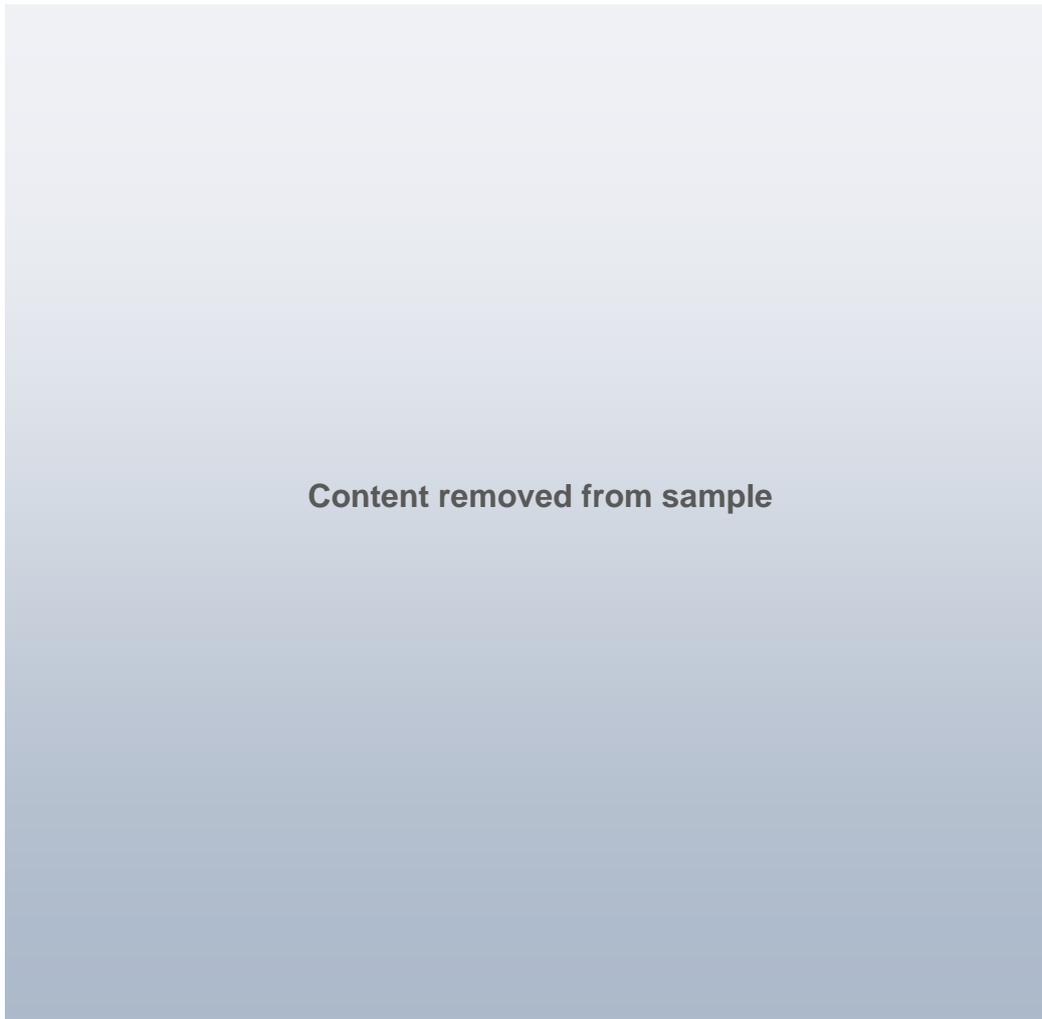
Retailing developments





What next for beauty and personal care?



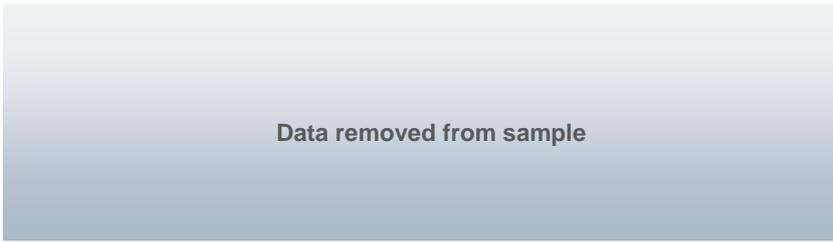


MARKET DATA

Table 10 Sales of Beauty and Personal Care by Category: Value 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
Beauty and Personal Care	Data removed from sample					
Baby and Child-specific Products						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						

Sun Care
 Premium Beauty and Personal Care
 Prestige Beauty and Personal Care
 Mass Beauty and Personal Care
 Dermocosmetics Beauty and Personal Care



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
 Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

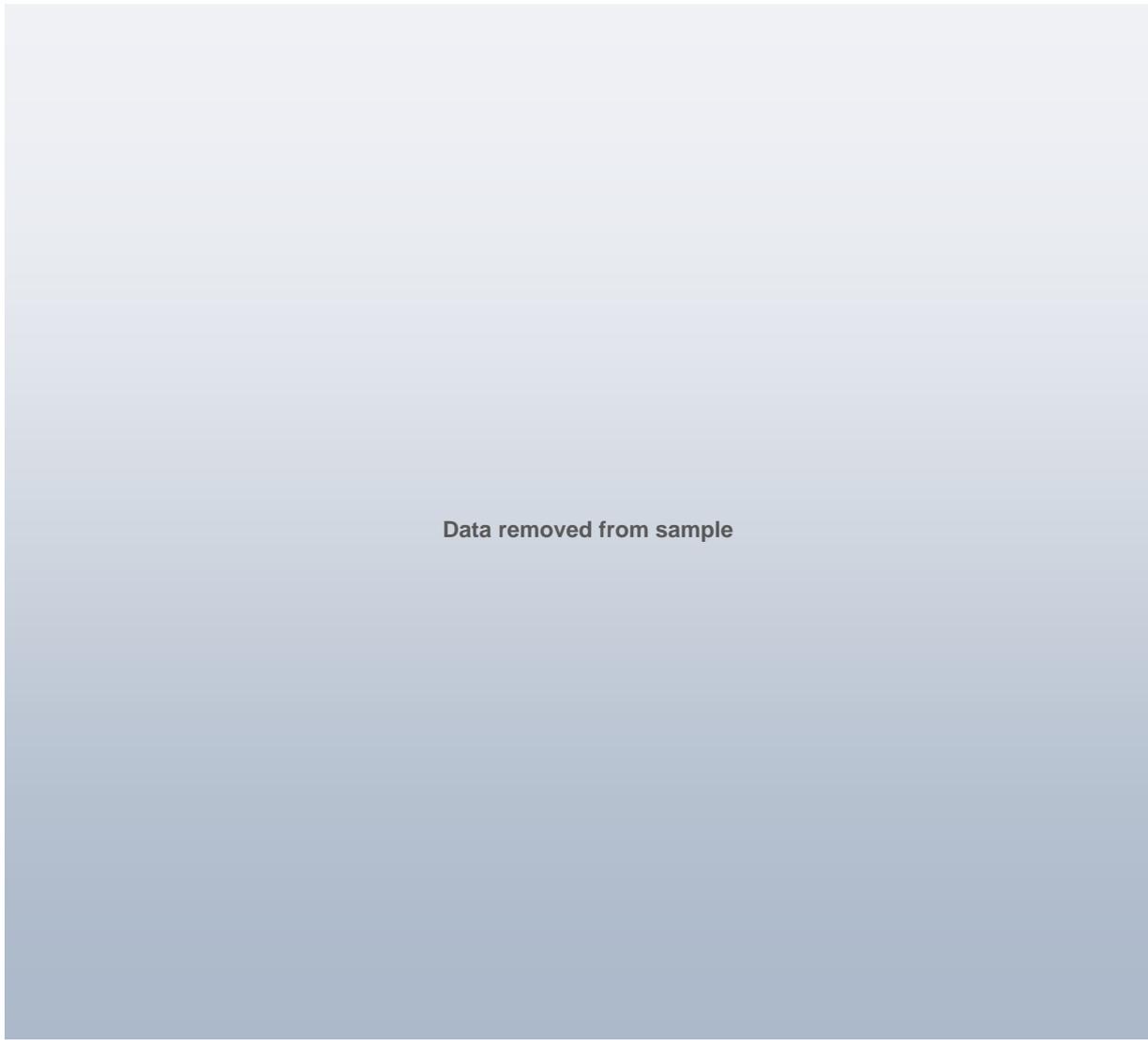
Table 11 Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Beauty and Personal Care	Data removed from sample		
Baby and Child-specific Products			
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			
Premium Beauty and Personal Care			
Prestige Beauty and Personal Care			
Mass Beauty and Personal Care			
Dermocosmetics Beauty and Personal Care			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
 Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

Table 12 GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

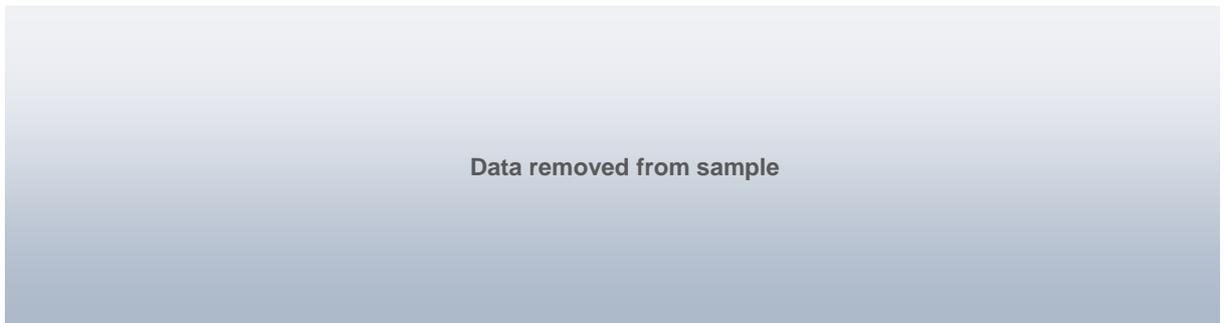
% retail value rsp	2019	2020	2021	2022	2023
Company	Data removed from sample				

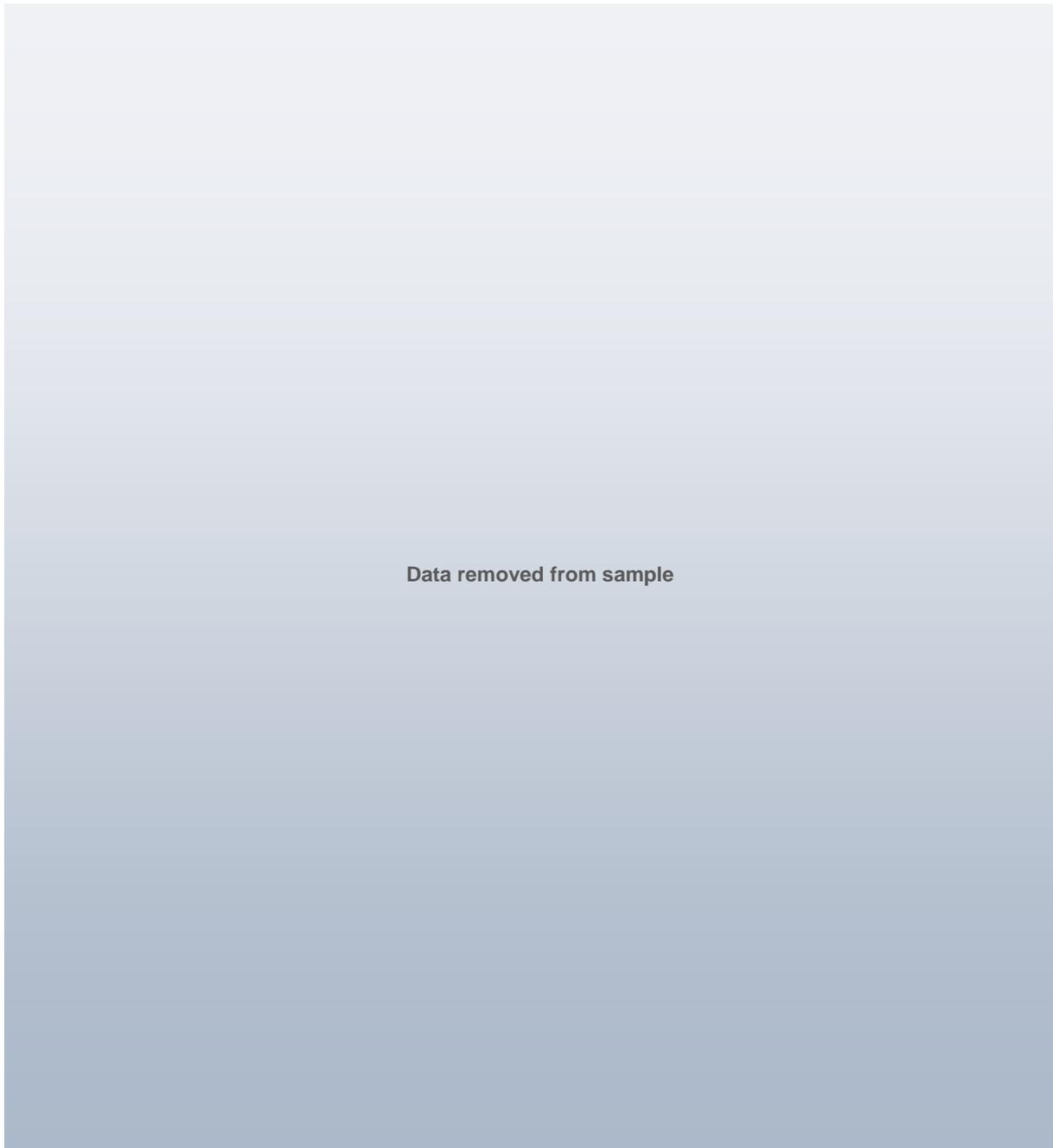


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
-------------------------------	------	------	------	------	------





Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
Beauty and Personal Care	Data removed from sample					
Baby and Child-specific Products						
Bath and Shower						
Deodorants						
Depilatories						
Hair Care						
Men's Grooming						
Oral Care						
Skin Care						
Sun Care						
Mass Beauty and Personal Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Distribution of Beauty and Personal Care by Format: % Value 2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels	Data removed from sample					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
---- Beauty Specialists						

- Pharmacies
- Optical Goods Stores
- Health and Personal Care Stores
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hair Salons
- Total



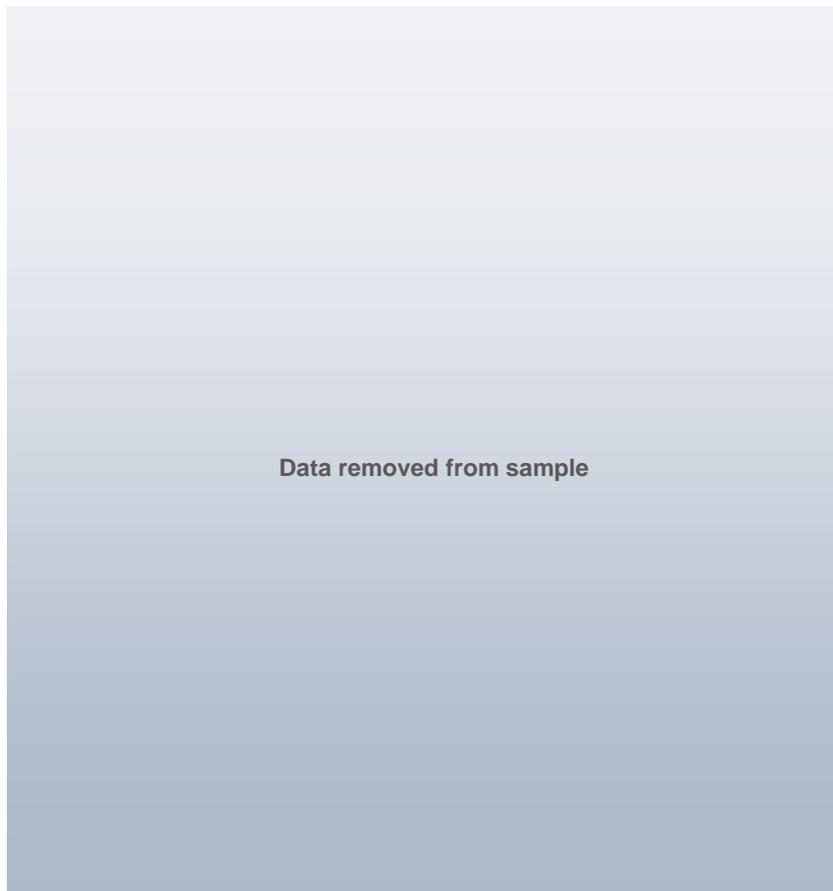
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Distribution of Beauty and Personal Care by Format and Category: % Value 2023

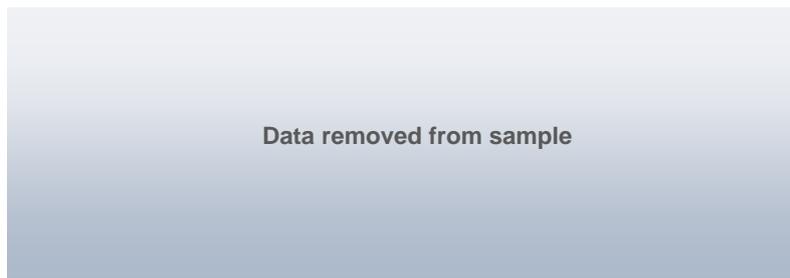
% retail value rsp

Baby and Child-specific Products	Bath and Shower	Colour Cosmetics	Deodorants	Depilatories	Fragrances
----------------------------------	-----------------	------------------	------------	--------------	------------

- Retail Channels
- Retail Offline
- Grocery Retailers
- Convenience Retail
- Convenience Stores
- Forecourt Retailers
- Supermarkets
- Hypermarkets
- Discounters
- Warehouse Clubs
- Food/drink/tobacco specialists
- Small Local Grocers
- Non-Grocery Retailers
- General Merchandise Stores
- Department Stores
- Variety Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Beauty Specialists
- Pharmacies
- Optical Goods Stores
- Health and Personal Care Stores
- Leisure and

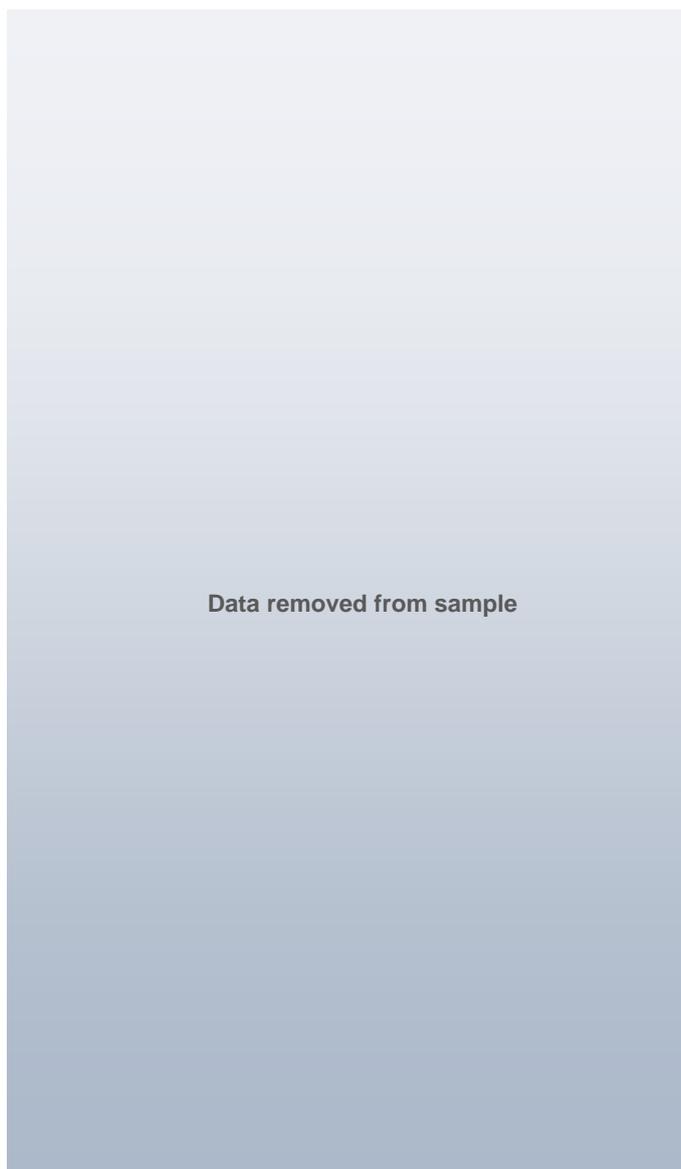


- Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hair Salons
- Total



Hair Care Men's Grooming Oral Care Skin Care Sun Care

- Retail Channels
- Retail Offline
- Grocery Retailers
- Convenience Retail
- Convenience Stores
- Forecourt Retailers
- Supermarkets
- Hypermarkets
- Discounters
- Warehouse Clubs
- Food/drink/tobacco specialists
- Small Local Grocers
- Non-Grocery Retailers
- General Merchandise Stores
- Department Stores
- Variety Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Beauty Specialists
- Pharmacies
- Optical Goods Stores
- Health and Personal Care Stores
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hair Salons
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SK = skin care; SU = sun care

Table 18 Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

BRL million	2023	2024	2025	2026	2027	2028
Beauty and Personal Care	Data removed from sample					
Baby and Child-specific Products						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care Excl Power Toothbrushes						
Skin Care						
Sun Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						
Dermocosmetics Beauty and Personal Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

Table 19 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Beauty and Personal Care	Data removed from sample		
Baby and Child-specific Products			
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care Excl Power Toothbrushes			
Skin Care			
Sun Care			
Premium Beauty and Personal Care			

Prestige Beauty and Personal Care
 Mass Beauty and Personal Care
 Dermocosmetics Beauty and Personal Care

Data removed from sample

- Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
- Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

DISCLAIMER

Forecast and scenario closing date: 8 April 2024
 Report closing date: 23 July 2024

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources	Content removed from sample
Trade Associations	
Trade Press	



Source: Euromonitor International