



# Passport

## Dermatologicals in Brazil

Euromonitor International

March 2024

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purposes only.

Some content and data have been  
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# DERMATOLOGICALS IN BRAZIL - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2023 DEVELOPMENTS

Dermatologicals sees healthy growth along with improvements in the economic scenario and lifestyles in 2023

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Demand for products designed to treat the scalp drives sales of medicated shampoos and hair loss treatments

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Competition from private label increases in nappy (diaper) rash treatments

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### PROSPECTS AND OPPORTUNITIES

Demographic dynamics may impact the demand for nappy (diaper) rash treatments in the long term

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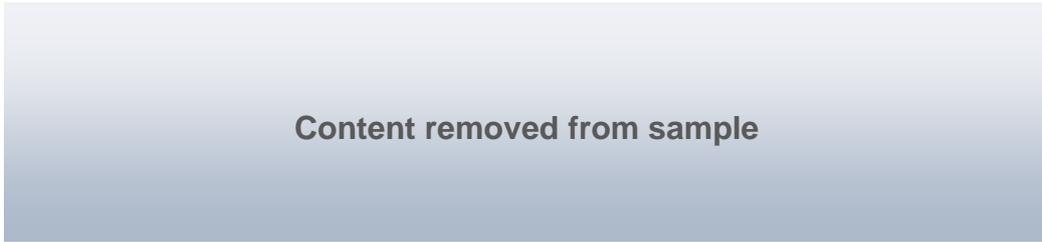
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The market potential for women's health is still little explored in brazil

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New hair loss remedy approved by anvisa

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**CATEGORY DATA**

**Table 1 Sales of Dermatologicals by Category: Value 2018-2023**

BRL million	2018	2019	2020	2021	2022	2023
Dermatologicals - Medicated Shampoos - Topical Antifungals - Vaginal Antifungals - Hair Loss Treatments - Nappy (Diaper) Rash Treatments - Antiparasitics/Lice (Head and Body) Treatments - Antipruritics - Cold Sore Treatments - Haemorrhoid Treatments - Paediatric Dermatologicals - Topical Allergy Remedies/Antihistamines - Topical Germicidals/Antiseptics	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Note: 2023 data is provisional and based on part-year estimates

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

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Dermatologicals - Medicated Shampoos - Topical Antifungals - Vaginal Antifungals - Hair Loss Treatments - Nappy (Diaper) Rash Treatments - Antiparasitics/Lice (Head and Body) Treatments - Antipruritics - Cold Sore Treatments - Haemorrhoid Treatments - Paediatric Dermatologicals	Data removed from sample		

- Topical Allergy Remedies/Antihistamines
- Topical Germicidals/Antiseptics

**Data removed from sample**

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

Note: 2023 data is provisional and based on part-year estimates

**Table 3 NBO Company Shares of Dermatologicals: % Value 2019-2023**

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

**Table 4 LBN Brand Shares of Dermatologicals: % 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 5 LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023**

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

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

**Table 6 Forecast Sales of Dermatologicals by Category: Value 2023-2028**

BRL million	2023	2024	2025	2026	2027	2028
Dermatologicals	<b>Data removed from sample</b>					
- Medicated Shampoos						
- Topical Antifungals						
- Vaginal Antifungals						
- Hair Loss Treatments						
- Nappy (Diaper) Rash Treatments						
- Antiparasitics/Lice						

- (Head and Body) Treatments
- Antipruritics
- Cold Sore Treatments
- Haemorrhoid Treatments
- Paediatric Dermatologicals
- Topical Allergy Remedies/Antihistamines
- Topical Germicidals/Antiseptics



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

Note: 2023 data is provisional and based on part-year estimates

**Table 7 Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028**

% constant value growth

2023/2024      2023-28 CAGR      2023/28 Total

- Dermatologicals
- Medicated Shampoos
- Topical Antifungals
- Vaginal Antifungals
- Hair Loss Treatments
- Nappy (Diaper) Rash Treatments
- Antiparasitics/Lice (Head and Body) Treatments
- Antipruritics
- Cold Sore Treatments
- Haemorrhoid Treatments
- Paediatric Dermatologicals
- Topical Allergy Remedies/Antihistamines
- Topical Germicidals/Antiseptics



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

Note: 2023 data is provisional and based on part-year estimates

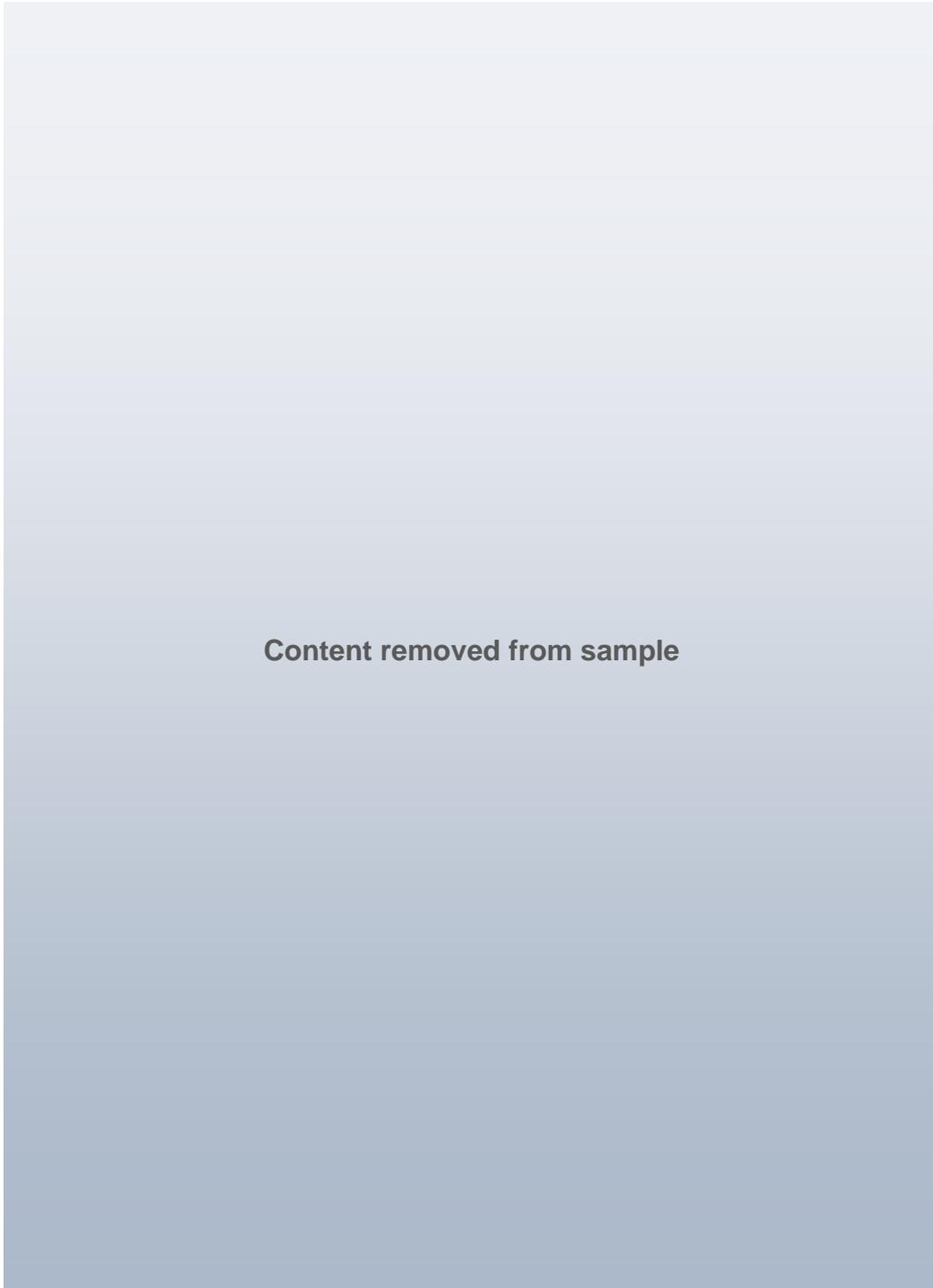
# CONSUMER HEALTH IN BRAZIL - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

Consumer health in 2023: The big picture

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## 2023 key trends



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## Competitive landscape



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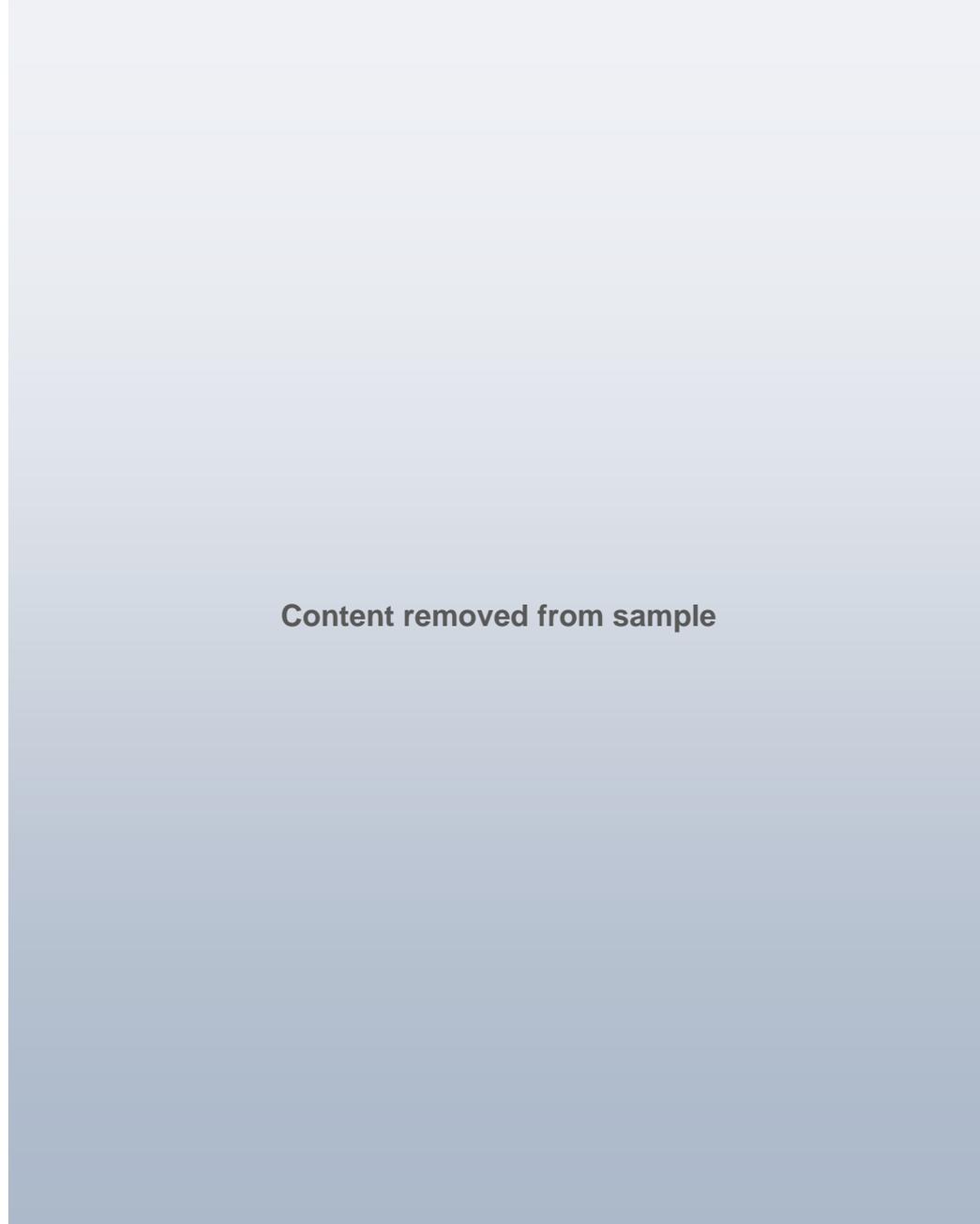
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**Retailing developments**

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What next for consumer health?



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**MARKET INDICATORS**

Table 8 Consumer Expenditure on Health Goods and Medical Services: Value 2018-2023

BRL million

	2018	2019	2020	2021	2022	2023
Pharmaceuticals,	Data removed from sample					

medical appliances/  
equipment  
Outpatient services  
Hospital services  
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade interviews

Table 9 Life Expectancy at Birth 2018-2023

years	2018	2019	2020	2021	2022	2023
Males	Data removed from sample					
Females	Data removed from sample					

Source: Euromonitor International from official statistics

## MARKET DATA

Table 10 Sales of Consumer Health by Category: Value 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
Consumer Health	Data removed from sample					
OTC	Data removed from sample					
Sports Nutrition	Data removed from sample					
Vitamins and Dietary Supplements	Data removed from sample					
Weight Management and Wellbeing	Data removed from sample					
Herbal/Traditional Products	Data removed from sample					
Allergy Care	Data removed from sample					
Paediatric Consumer Health	Data removed from sample					

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

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing

Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements

Note 3: 2023 data is provisional and based on part-year estimates

Table 11 Sales of Consumer Health by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Consumer Health	Data removed from sample		
OTC	Data removed from sample		
Sports Nutrition	Data removed from sample		
Vitamins and Dietary Supplements	Data removed from sample		

Weight Management and Wellbeing  
 Herbal/Traditional Products  
 Allergy Care  
 Paediatric Consumer Health

**Data removed from sample**

- Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
- Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing
- Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements
- Note 3: 2023 data is provisional and based on part-year estimates

**Table 12 NBO Company Shares of Consumer Health: % Value 2019-2023**

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

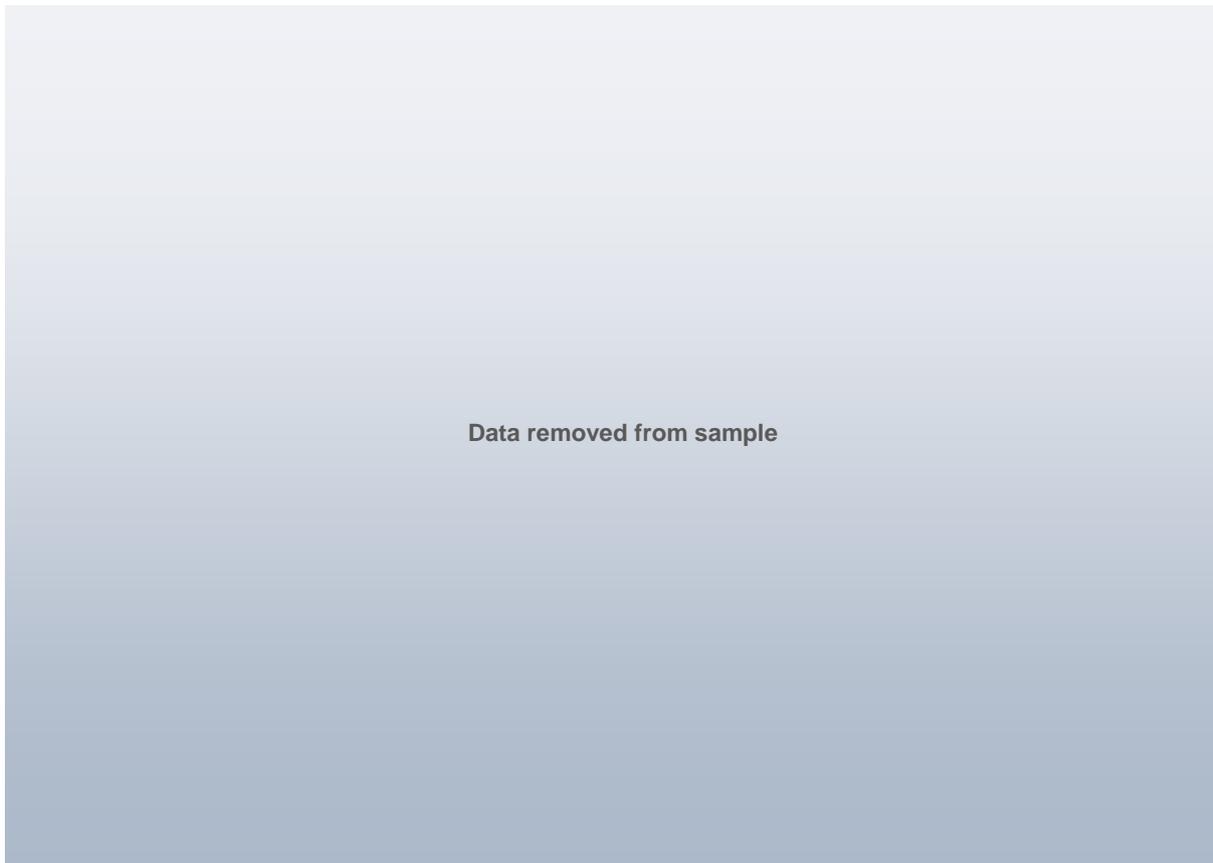
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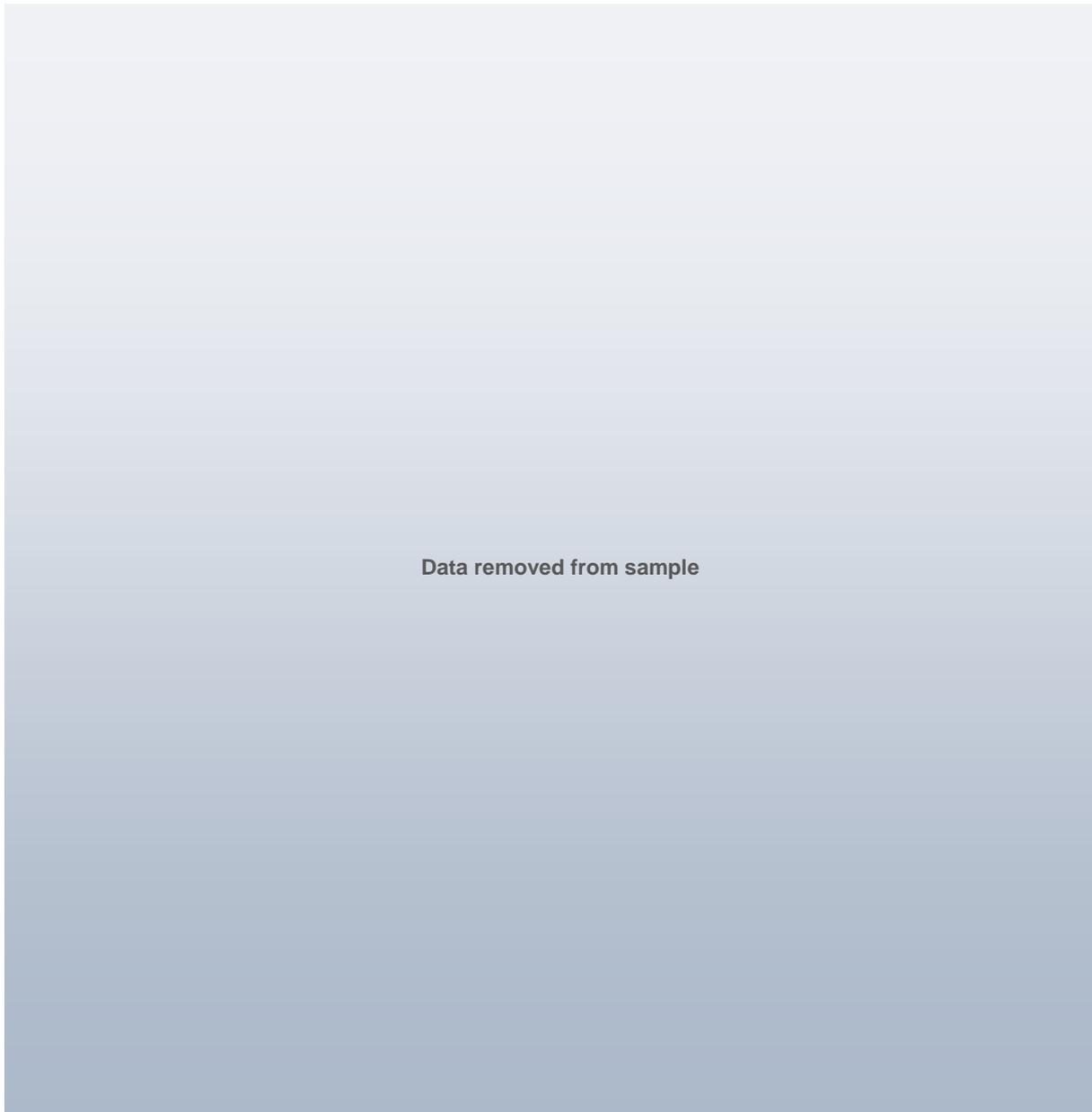


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 13** LBN Brand Shares of Consumer Health: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
-----------------------------------	---------------	------	------	------	------





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

**Table 14 Penetration of Private Label in Consumer Health by Category: % Value 2018-2023**

% retail value rsp	2018	2019	2020	2021	2022	2023
Consumer Health Vitamins and Dietary Supplements	<b>Data removed from sample</b>					

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

**Table 15** Distribution of Consumer Health by Format: % Value 2018-2023

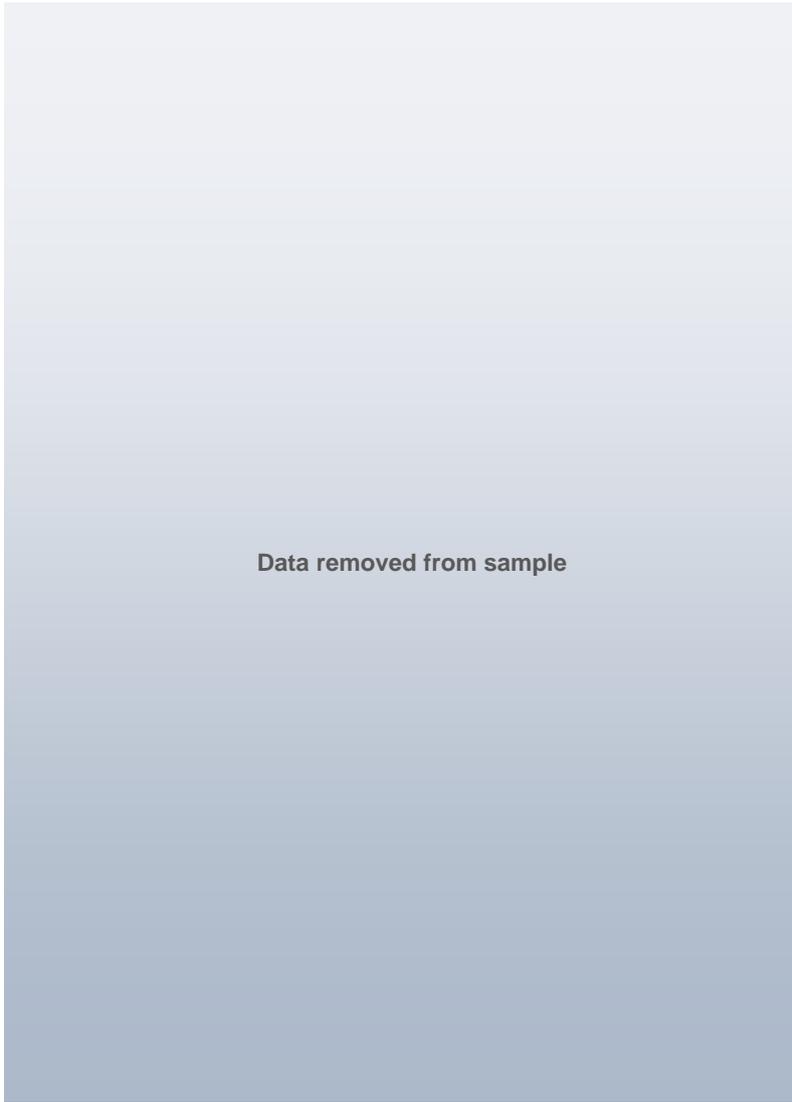
% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels	<b>Data removed from sample</b>					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- 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						
Total						

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

**Table 16** Distribution of Consumer Health by Format and Category: % Value 2023

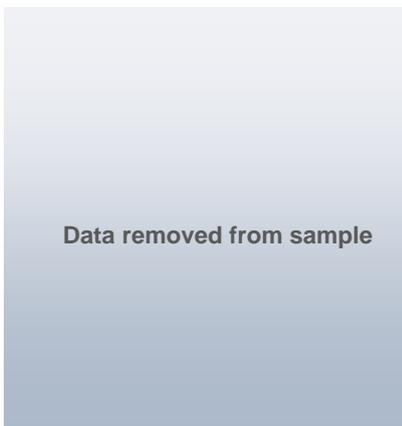
% retail value rsp	OTC	Sports Nutrition	Vitamins and Dietary Supplements	Weight Management and Wellbeing	Herbal/Traditional Products	Allergy Care

- 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
- Total



Paediatric  
Consumer  
Health

- 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
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Key: OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WMW = weight management and wellbeing; HTP = herbal/traditional products; AC = Allergy Care; PCH = paediatric consumer health

**Table 17 Forecast Sales of Consumer Health by Category: Value 2023-2028**

BRL million	2023	2024	2025	2026	2027	2028
Consumer Health	Data removed from sample					
OTC						
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and Wellbeing						
Herbal/Traditional Products						
Allergy Care						
Paediatric Consumer Health						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources  
 Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing  
 Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements  
 Note 3: 2023 data is provisional and based on part-year estimates

**Table 18 Forecast Sales of Consumer Health by Category: % Value Growth 2023-2028**

% constant value growth

2023/2024      2023-28 CAGR      2023/28 Total

Consumer Health  
 OTC  
 Sports Nutrition  
 Vitamins and Dietary Supplements  
 Weight Management and Wellbeing  
 Herbal/Traditional Products  
 Allergy Care  
 Paediatric Consumer Health

**Data removed from sample**

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

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing

Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements

Note 3: 2023 data is provisional and based on part-year estimates

## APPENDIX

### Otc registration and classification

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Vitamins and dietary supplements registration and classification

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Self-medication/self-care and preventive medicine

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## Switches

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## DISCLAIMER

Forecast and scenario closing date: 4 September 2023

Report closing date: 18 March 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](http://www.euromonitor.com) and via the Passport system, where new content is being added on a systematic basis.

## DEFINITIONS

The total market size given for consumer health is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing.

The sum of these categories is greater than actual market size because allergy care is a duplicate of categories found in cough, cold and allergy (hay fever) remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and

vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements.

2023 data are provisional and based on part-year estimates.

## SOURCES

Sources used during the research included the following:

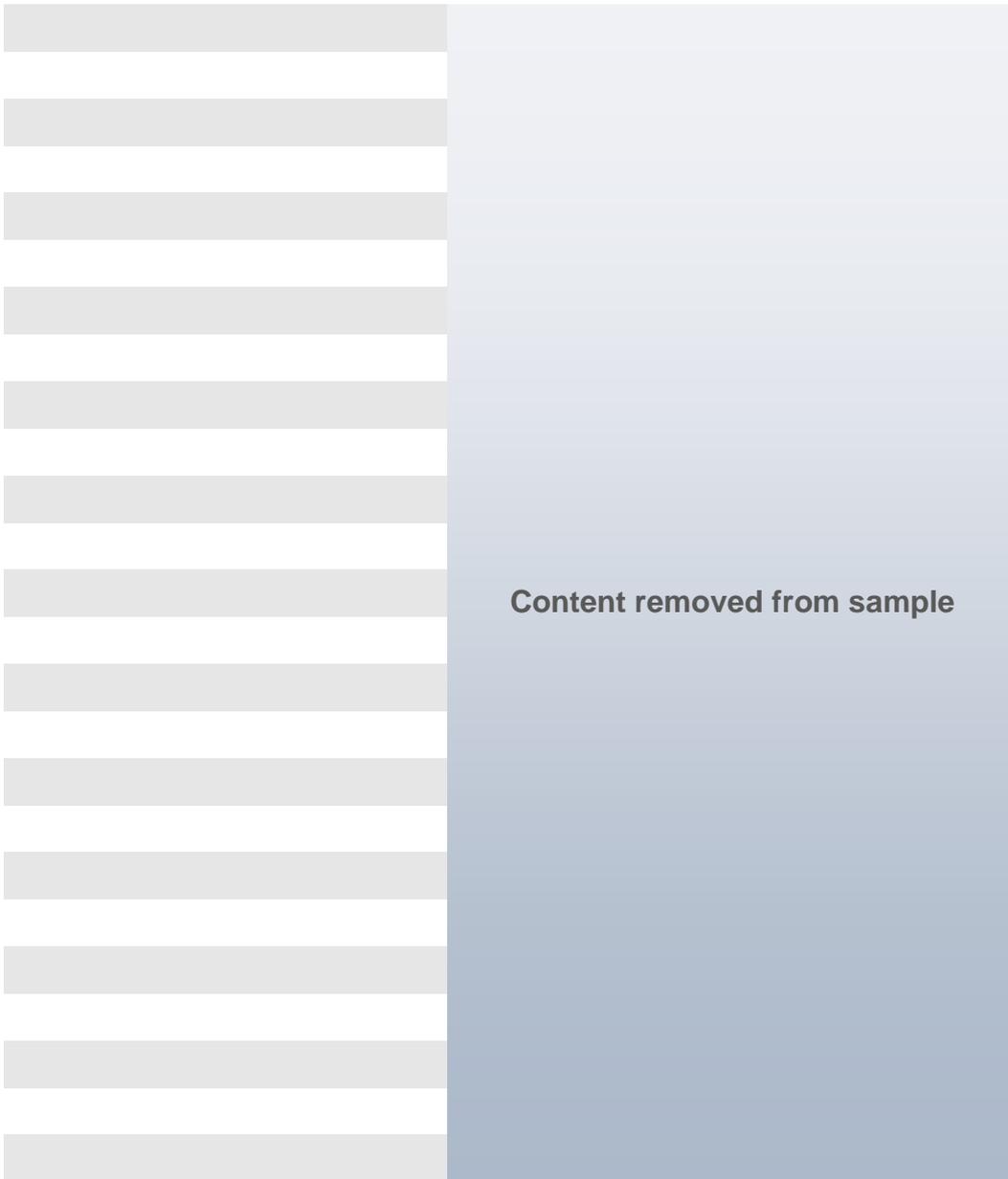
### Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

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Source: Euromonitor International