Passport

# Dermatologicals in Brazil

Euromonitor International

March 2024

# LIST OF CONTENTS AND TABLES

# DERMATOLOGICALS IN BRAZIL - CATEGORY ANALYSIS

## KEY DATA FINDINGS

Content removed from sample

## 2023 DEVELOPMENTS

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

Content removed from sample

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

Content removed from sample

Content removed from sample

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

Content removed from sample

## PROSPECTS AND OPPORTUNITIES

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

Content removed from sample

Content removed from sample

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

Content removed from sample

## New hair loss remedy approved by anvisa

Content removed from sample

**Content removed from sample**

## 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 |
|---|---|---|---|---|---|

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 4 LBN Brand Shares of Dermatologicals: % 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 5 LBN Brand Shares of Hair Loss Treatments: % 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 6 Forecast Sales of Dermatologicals by Category: Value 2023-2028

BRL million

| | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|---|---|---|---|---|---|
| Dermatologicals | | | | | | |
| - Medicated Shampoos | | | | | | |
| - Topical Antifungals | | | | | | |
| - Vaginal Antifungals | | | | | | |
| - Hair Loss Treatments | | | | | | |
| - Nappy (Diaper) Rash Treatments | | | | | | |
| - Antiparasitics/Lice | | | | | | |

**Data removed from sample**

| | |
|---|---|
| (Head and Body) Treatments | Data removed from sample |
| - 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 | Data removed from sample | | |
| - 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

**Content removed from sample**

## 2023 key trends

Content removed from sample

## Competitive landscape

Content removed from sample

Content removed from sample

## Retailing developments

Content removed from sample

Content removed from sample

## What next for consumer health?

Content removed from sample

# 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 | Data removed from sample |
| Outpatient services | |
| Hospital services | |
| Total | |

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 | | | | | | |

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

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 | | | |
| Sports Nutrition | | | |
| Vitamins and Dietary Supplements | | | |

| | |
|---|---|
| Weight Management and Wellbeing | Data removed from sample |
| Herbal/Traditional Products | |
| Allergy Care | |
| Paediatric Consumer Health | |

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 |
|---|---|---|---|---|---|
| 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 13 LBN Brand Shares of Consumer Health: % 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 14 Penetration of Private Label in Consumer Health by Category: % Value 2018-2023

% retail value rsp

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| Consumer Health | Data removed from sample | | | | | |
| Vitamins and Dietary Supplements | | | | | | |

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 | | | | | | |
| - 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 | | | | | | |

**Data removed from sample**

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

**Data removed from sample**

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

**Data removed from sample**

| | |
|---|---|
| ---- Department Stores | Data removed from sample |
| ---- 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 | 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

# APPENDIX

## Otc registration and classification

**Content removed from sample**

Content removed from sample

Content removed from sample

## Vitamins and dietary supplements registration and classification

Content removed from sample

## Self-medication/self-care and preventive medicine

Content removed from sample

Content removed from sample

## Switches

Content removed from sample

## 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 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 | Content removed from sample |
| | |
| | |
| Trade Associations | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| Trade Press | |

Content removed from sample

Source: Euromonitor International