

Eye Care in Brazil

Euromonitor International March 2024

This sample report is for illustration purposes only.

Some content and data have been changed.

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-	courages the use of eye drops to treat acne	
	ND OPPORTUNITIES	
	ses of myopia amongst children and adolescents will stimulate the theraped	
	eye drops	∠
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EYE CARE IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS

2023 DEVELOPMENTS

Digitalisation increases exposure time to screens and boosts demand for eye care products for different ages

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Eye care remains concentrated, dominated by two multinationals

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Tiktok trend encourages the use of eye drops to treat acne
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PROSPECTS AND OPPORTUNITIES
Increase in cases of myopia amongst children and adolescents will stimulate the therapeutic use of atropine eye drops
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EYE CARE IN BRAZIL Passport $\,3\,$

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The quest for healthy ageing and preventive care will lead to increasing competition from vitamins and dietary supplements
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Pharmacy campaigns likely to continue to appear, as a good strategy to circumvent inflation in the forecast period
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CATEGORY DATA

Passport 4 EYE CARE IN BRAZIL

Table 1 Sales of Eye Care by Category: Value 2018-2023

BRL million

2018 2019 2020 2021 2022 2023

Eye Care - Allergy Eye Care

Data removed from sample

- Standard Eye Care 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 Eye Care by Category: % Value Growth 2018-2023

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

Data removed from sample

Eye Care

- Allergy Eye Care

- Standard Eye Care

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 Eye Care: % Value 2019-2023

% retail value rsp

2022 2019 2020 2021 2023 Company

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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 Eye Care: % Value 2020-2023

% retail value rsp

Brand (GBO) Company (NBO) 2020 2021 2022 2023

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Passport 5EYE CARE IN BRAZIL

Data removed from sample

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

Table 5 Forecast Sales of Eye Care by Category: Value 2023-2028

BRL million

2023 2024 2025 2026 2027 2028

Eye Care - Allergy Eye Care

Data removed from sample

- Standard Eye Care

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

Note:

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Table 6 Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

Eye Care

- Allergy Eye Care

- Standard Eye Care

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

Note:

CONSUMER HEALTH IN BRAZIL - INDUSTRY OVERVIEW

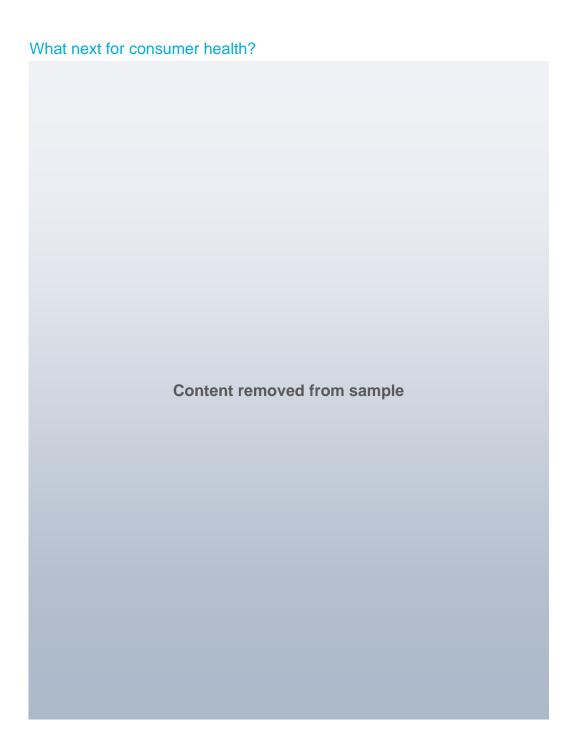
EXECUTIVE SUMMARY

Consumer health in 2023: The big picture
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2023 key trends	
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Competitive landscape	
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	Jones Temoved Hom Sam	pic
Retailing developme	ents	
	Content removed from sam	ple

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MARKET INDICATORS

Table 7 2023	Consumer Expend	iture on Health	Goods and M	ledical Servic	es: Value 201	8-	
BRL million		2018	2019	2020	2021	2022	2023
Pharmaceutica	ıls,		Da	ata 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 8 Life Expectancy at Birth 2018-2023

years

2018 2019 2020 2021 2022 2023

Males
Females

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Source: Euromonitor International from official statistics

MARKET DATA

Table 9 Sales of Consumer Health by Category: Value 2018-2023

BRL million

2018 2019 2020 2021 2022 2023

Data removed from sample

Consumer Health

OTC

Sports Nutrition
Vitamins and Dietary
Supplements

Weight Management and

Wellbeing Herbal/Traditional Products

Paediatric Consumer

Health

Allergy Care

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

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

Consumer Health OTC

Sports Nutrition

Vitamins and Dietary Supplements

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Passport 13 EYE CARE IN BRAZIL

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

Note 2:

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Source:

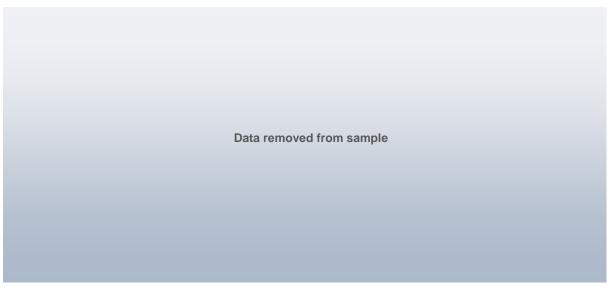
Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight Note 1: management and wellbeing

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

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

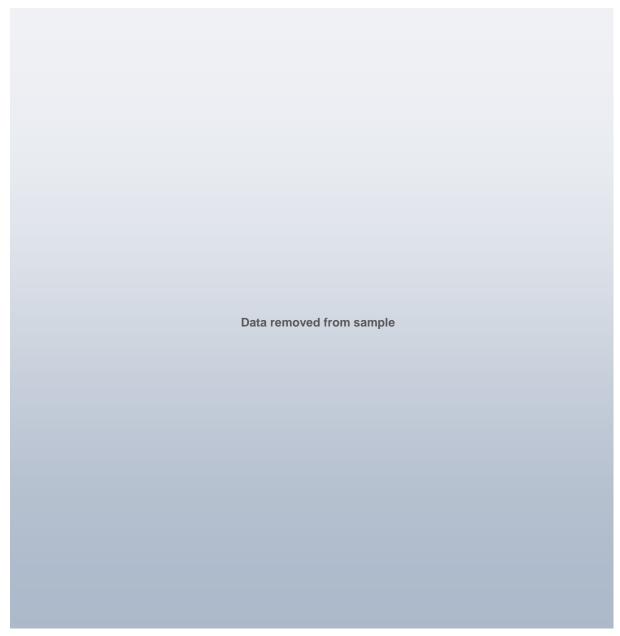


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Consumer Health: % Value 2020-2023

| Data removed from sample | Data removed from s

% retail value rsp



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

Table 13 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

Data removed from sample

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

Table 14 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 Data removed from sample --- 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

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 and Category: % Value 2023

% retail value rsp

OTC Sports Vitamins Weight Herbal/ Allergy

Nutrition and Management Traditiona Care

Dietary and I Products

Supplements

Wellbeing

- Retail E-Commerce

Total

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

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Passport 18 EYE CARE IN BRAZIL

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---- 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 16 Forecast Sales of Consumer Health by Category: Value 2023-2028

BRL million 2023 2024 2025 2026 2027 2028

Data removed from sample

Consumer Health 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,

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

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

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

Passport 19 EYE CARE IN BRAZIL

% 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

- Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
- Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight Note 1: management and wellbeing
- management and wellbeing 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 2023 data is provisional and based on part-year estimates Note 2:
- Note 3:

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 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

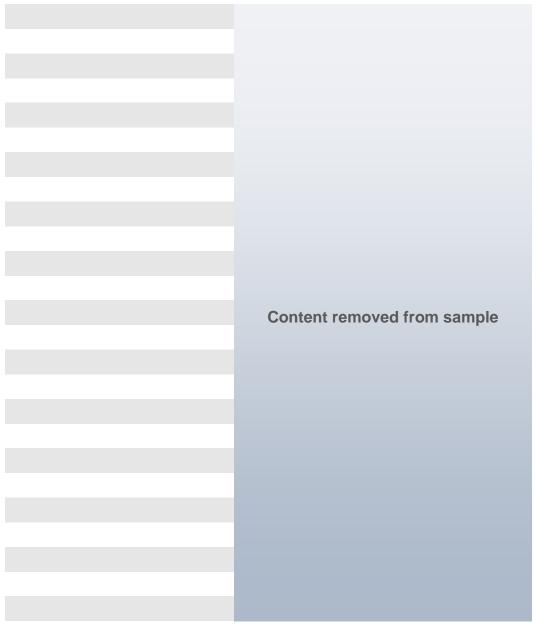
vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements.

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

SOURCES

Sources used during the research included the following:

Summary 1	Research Sources	
Official Source	S	
Trade Associat	iions	
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Source: Euromonitor International