Passport

Sleep Aids in Brazil

Euromonitor International

March 2024

LIST OF CONTENTS AND TABLES

SLEEP AIDS IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Double-digit growth supported by the pursuit of quality sleep and the authorisation to sell melatonin without a prescription

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Blurring wellness space: Sleep aids compete with several other categories aimed at improving sleep quality

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Increasing integration between pharmacies and digital channels for the democratisation of sleep improvement

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PROSPECTS AND OPPORTUNITIES

Innovation and technology will continue to push the boundaries of growth

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Credibility and a more natural appeal could dictate the category's next steps

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The quest to treat the cause rather than the symptom could limit demand in the long term

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CATEGORY DATA

Table 1 Sales of Sleep Aids: Value 2018-2023

BRL million

	2018	2019	2020	2021	2022	2023
Sleep Aids	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 Sleep Aids: % Value Growth 2018-2023

% current value growth

	2022/23	2018-23 CAGR	2018/23 Total
Sleep Aids	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 Sleep Aids: % 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 Sleep Aids: % 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 5 Forecast Sales of Sleep Aids: Value 2023-2028

BRL million

	2023	2024	2025	2026	2027	2028
Sleep Aids	Data removed from sample					

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 6 Forecast Sales of Sleep Aids: % Value Growth 2023-2028

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
Sleep Aids	Data removed from sample		

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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Retailing developments

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What next for consumer health?

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MARKET INDICATORS

Table 7 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 8 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 9 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 10 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 11 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 12 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 13 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 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						
--- 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 15 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

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---- 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 16 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
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Note 3: 2023 data is provisional and based on part-year estimates

Table 17 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 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	

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Source: Euromonitor International