



# BRAZILIAN BEAUTY TESTING TRENDS 2024



Ariana Estevas Dias



Leila Bloch



October 3<sup>rd</sup> 2024 | Anne Charpentier | [acharpentier@skinobs.com](mailto:acharpentier@skinobs.com)



# CONTENT

Context of the Brazilian Beauty Market

Key Testing Trends

*#1 Hair*

*#2 Pigmentation and complexion*

*#3 Suncare*

# CONTEXT OF THE BRAZILIAN BEAUTY MARKET

South America Culture ✨

## Key numbers

**Average salary:**  
\$8,140/year **GDP**  
**accounting** for 2% of  
global GDP  
**Beauty market value:**  
\$33,14 billions

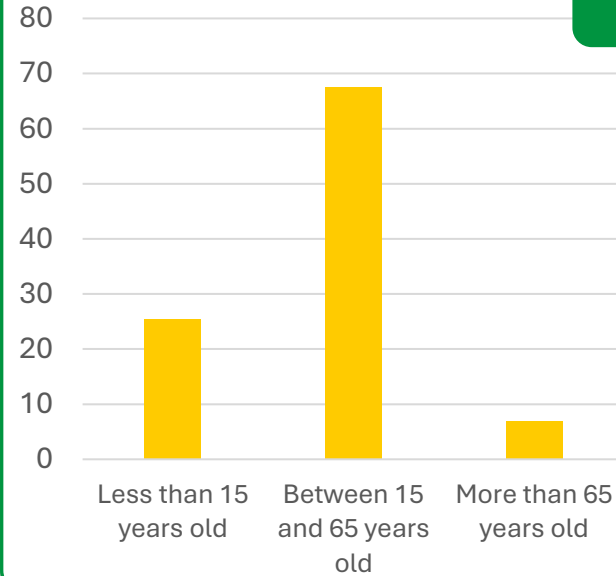


**43%**

Diversity of the  
population

Strength for testing  
laboratories: different hair,  
skin, body types

## Average age of population

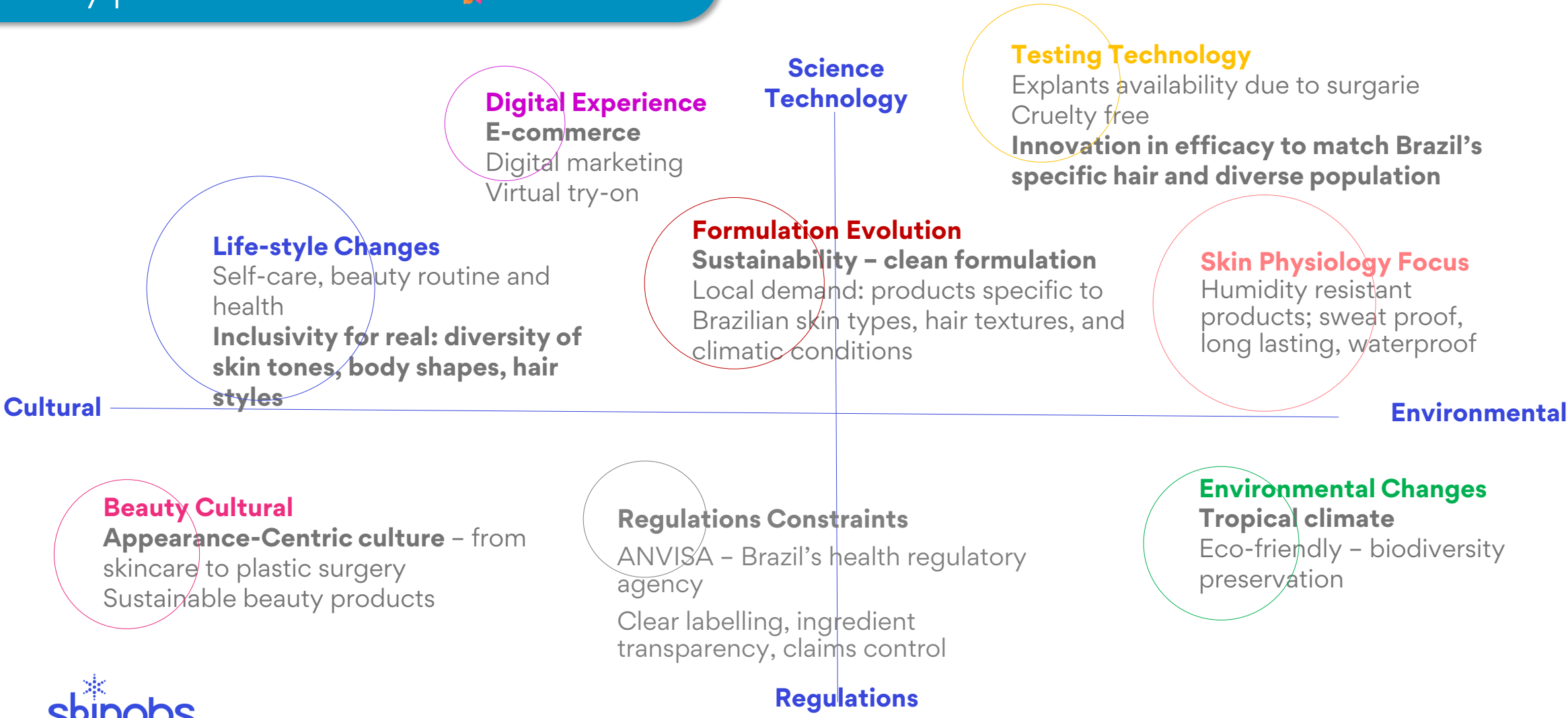


Declining demography: rise  
in anti-ageing products  
demands



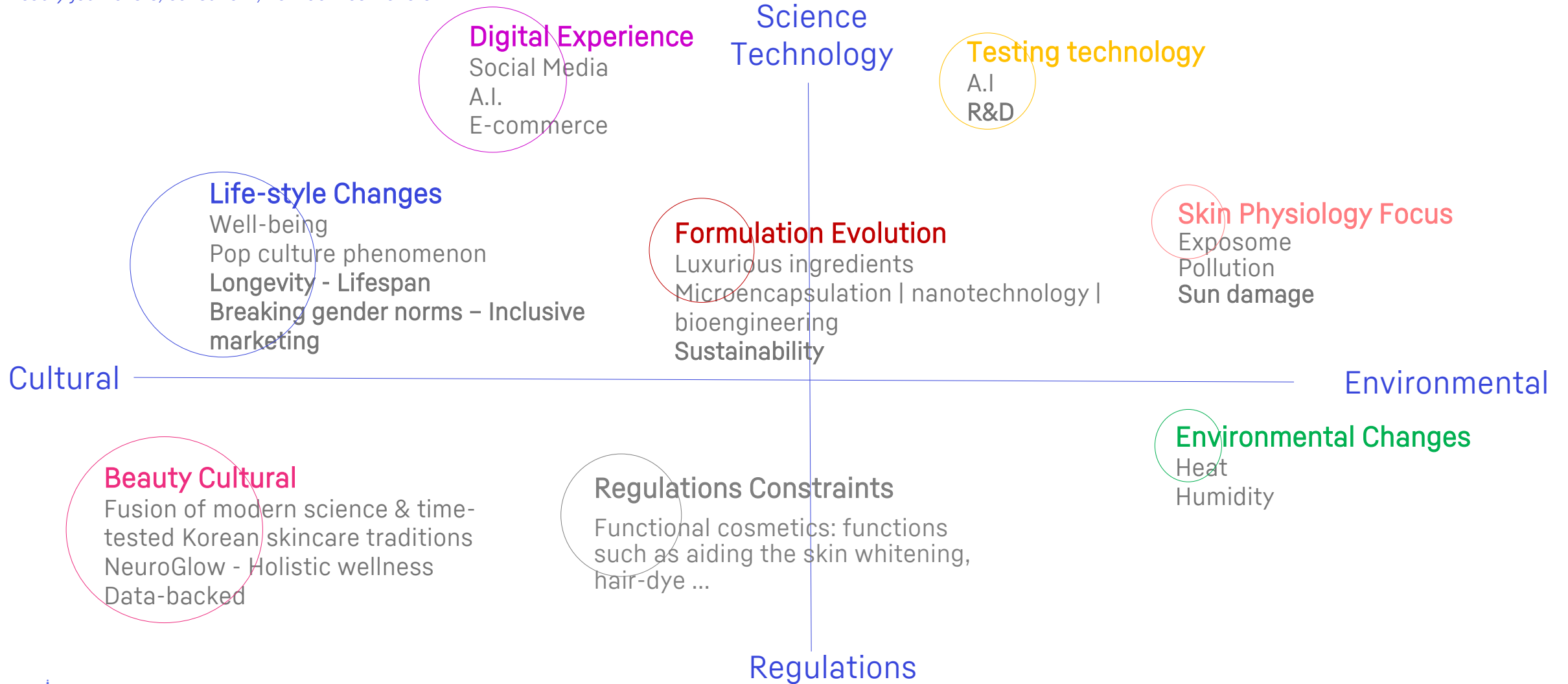
# CONTEXT OF THE LATIN AMERICA BEAUTY MARKET

Key points of the market 🚀

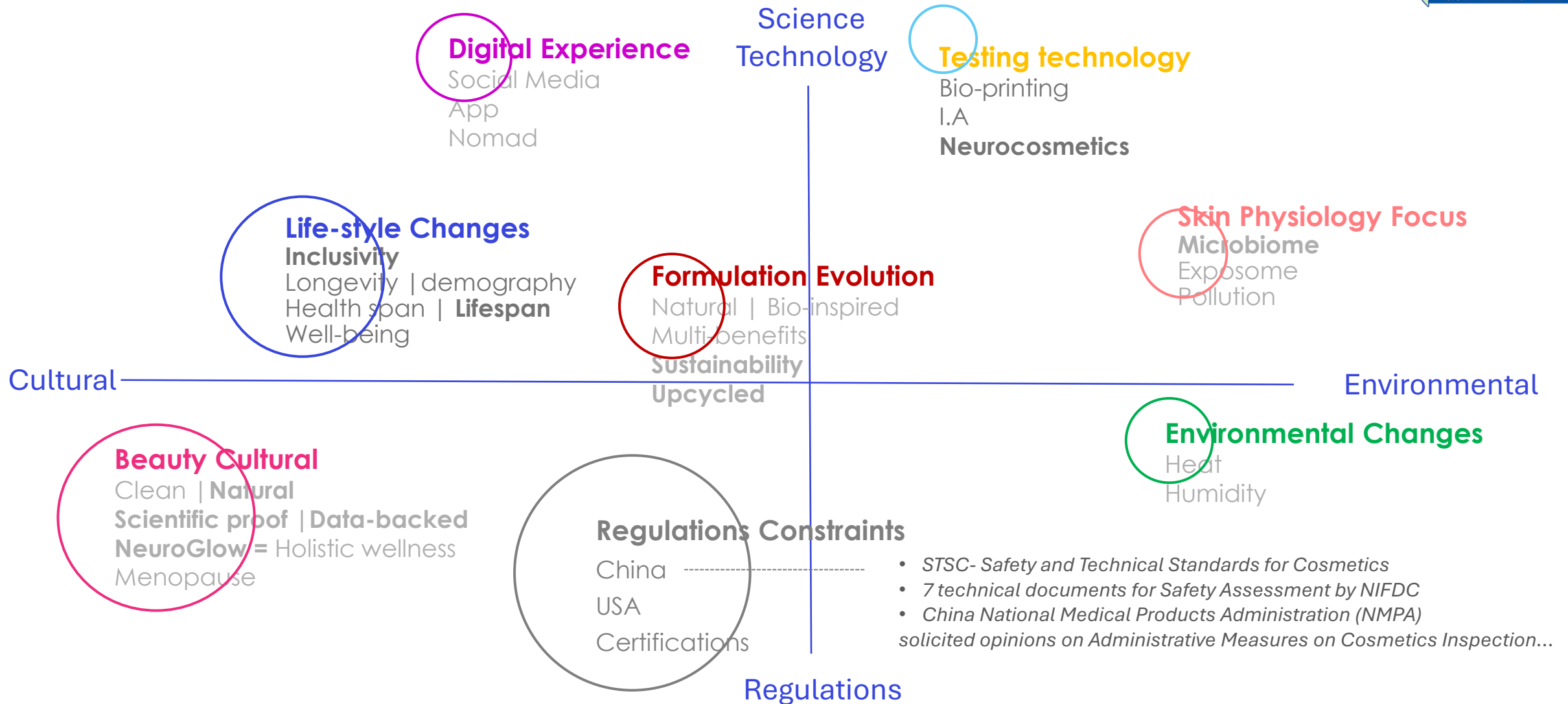


# Context of the K-Beauty market 2024

Summary of 20 meetings with CROs managers, K-Beauty journalists, consultant, R&D actives makers...

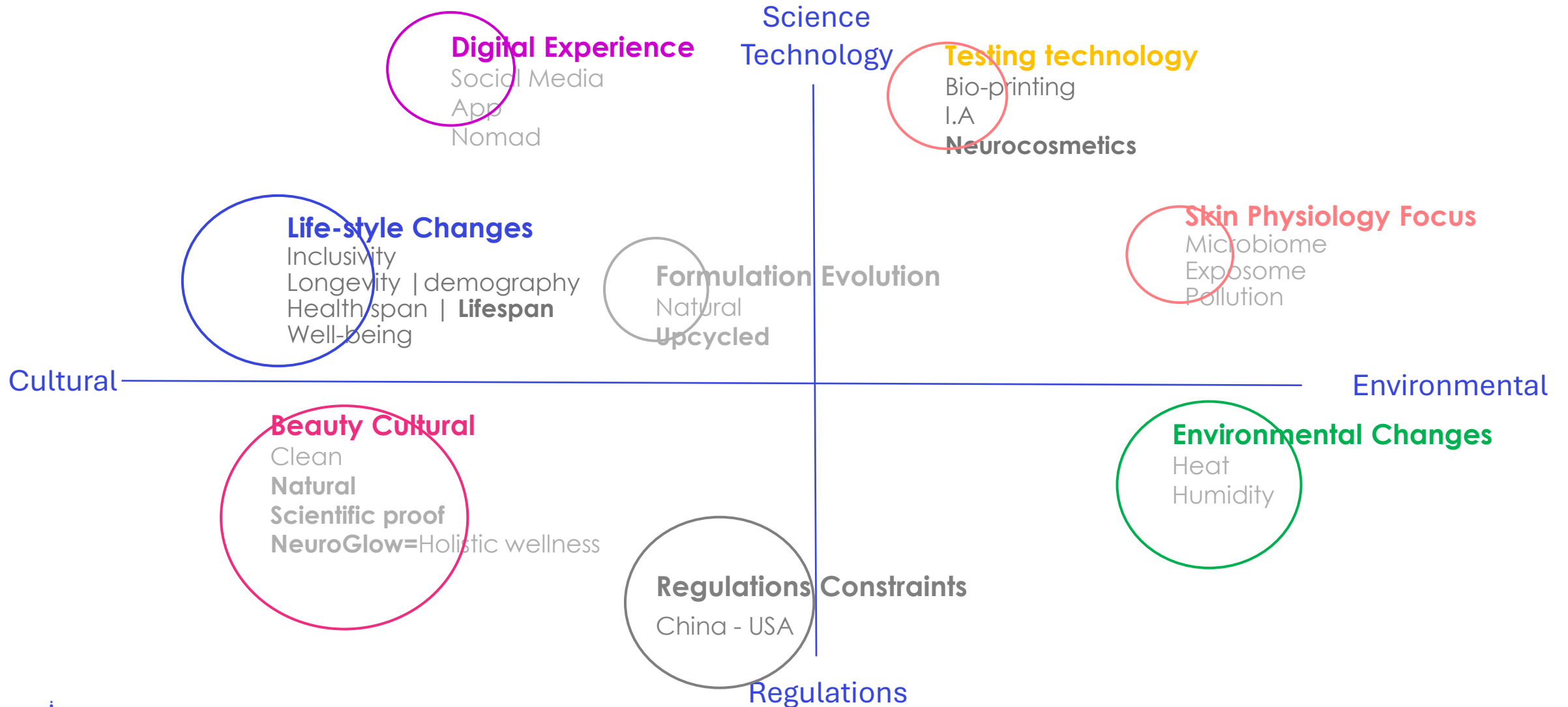


# Context of the Beauty evaluation in USA - 2024





# Context of the Beauty evaluation – Europe 2024



# CONTEXT OF THE BRAZILIAN BEAUTY MARKET

Key points of the market 🚀

	STRENGTHS	WEAKNESSES
Beauty market	<ul style="list-style-type: none"> <li>++ <b>Local brands</b> dominating the market</li> <li>++ Natural and organic products</li> <li><b>2<sup>nd</sup> largest</b> consumer in perfume and hygiene products</li> <li>++ dermocosmetics</li> </ul>	<ul style="list-style-type: none"> <li>High competition with non-local brands</li> <li>L'Oréal, Unilever, Procter &amp; Gamble</li> </ul>
Political	<ul style="list-style-type: none"> <li>- Regional power in Latin America</li> <li>- Population - 200 millions</li> <li>- Emerging country</li> </ul>	<ul style="list-style-type: none"> <li>Concentration of the population on the coast due to the Amazon forest</li> </ul>
Economical	<ul style="list-style-type: none"> <li>- <b>3<sup>rd</sup> largest beauty and personal care market</b></li> <li>- Estimated value: \$33,14 billions</li> <li>- Brazil is one of the largest worldwide economy</li> </ul>	<ul style="list-style-type: none"> <li>- Low average income - \$678 per month, \$8,140 per year</li> <li>- Inflation in Argentina</li> </ul>
Technological	<ul style="list-style-type: none"> <li>E-commerce - 20% of the sales</li> </ul>	<ul style="list-style-type: none"> <li>Green technology</li> </ul>
Cultural/Social	<ul style="list-style-type: none"> <li>- Worldwide influence: Rio's carnival, Brazilian culture ...</li> <li>- Sustainability</li> <li>- Indigenous culture</li> </ul>	<ul style="list-style-type: none"> <li>Social inequalities</li> </ul>



## Top 10 brands in Brazil

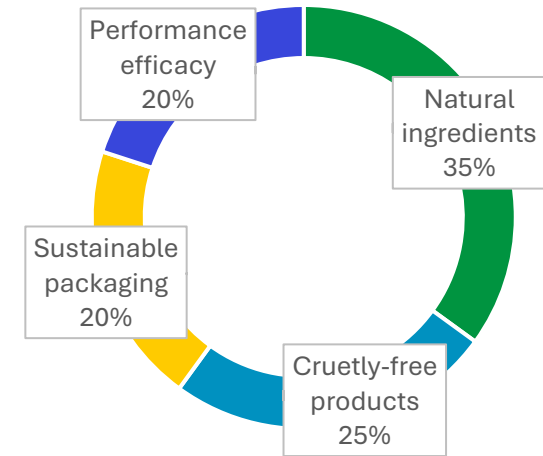
- Natura
- O Boticário
- Avon
- Jaquiti
- L'Oréal
- Mary Kay
- Quem Disse,
- Berenice?
- Vult
- Eudora
- Johnson&Johnson

« Dupes » culture

Mix between innovation and tradition

Tropical climate – sweat and water resistance – hygiene and deodorant

## Consumers preferences



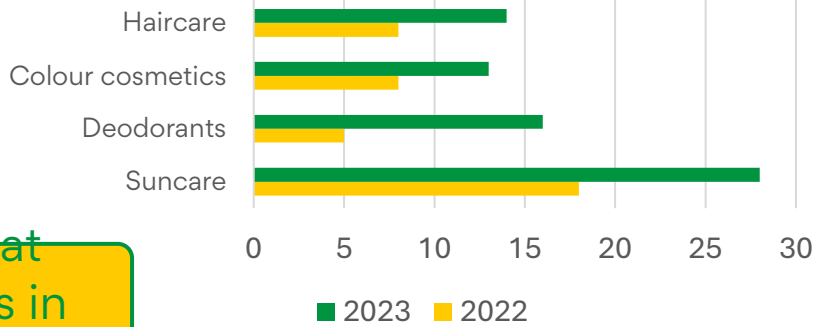


# CONTEXT OF THE BRAZILIAN BEAUTY MARKET

Focus on testing 



Beauty and personal care in Brazil growth, %



9 heat waves in Brazil in 2024

13 providers in Brazil on skinobs.com



Focus on explants preclinical assays: easy thanks to surgery explants

Price & taxes to import testing devices

Regulation: mandatory ethics committee for all tests

Sun care  
Deodorants  
Hair care

**Dermocosmetics +20% of the sales**

Few laboratories in LATAM ?

Compliance with the testing regulation of the Indie Brands?

Not all brands conducts test on their products

Tolerance  
HRPIT

Sensitive skin

Dermatologist approval



# KEY TESTING TRENDS

## #1 Hair

- Specific instrumentation like combing machine
- Diversity of hair style and types
- Climate humidity & warm

In vivo  
On  
On hair follicle-  
strands  
explants



Smoothing  
Moisturizing  
Reparing  
Detangling

Anti-frizz  
Straightening  
Volumizing  
Anti-breakage  
Humidity resistance

Thickening  
Elasticity  
Shining



# KEY TESTING TRENDS

## #1 Hair

- Hair growth
- Hair strength
- Scalp surface
- Hair structure
- Hair styling
- Rinsability



Visioscan  
SkinCam  
Image analysis



# KEY TESTING TRENDS

## #2 Pigmentation and complexion

### FACE OVERALL ANALYSIS



VisioFace - C+K



Visia Complexion  
Canfield



### SKIN GLOSS ANALYSIS



Antera3D - Miravex



Glossymeter - C+K



C-Cube - Pixience

Brightening  
Long lasting  
Waterproof  
Glowing  
Tan prolonging  
Exfoliation  
Covering





# KEY TESTING TRENDS

## #2 Pigmentation and complexion

### LONG LASTING AND OIL CONTROL

- Sebum control
- Pore size
- Pore pigmentation
- Specific routine for consumer testing

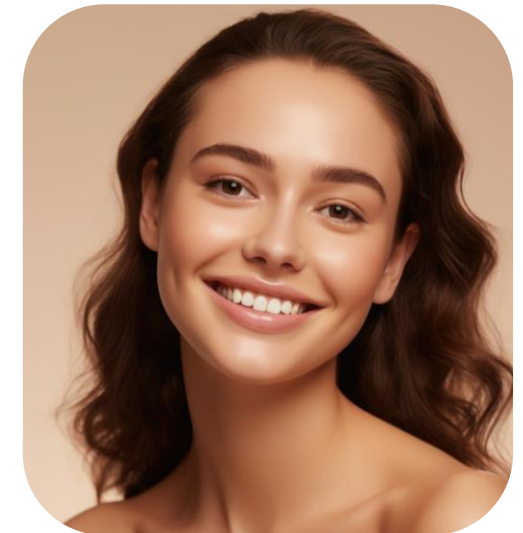


Makeup  
« skinification »

Makeup  
lasting



Full face  
analysis  
Sebumeter  
Skin surface  
Color measurement



# KEY TESTING TRENDS

## #3 Suncare

Silico | tubo | vitro

- Hybrid method to be validated 23.675
- New in Vitro Sand-resistance method
- Sweat resistance





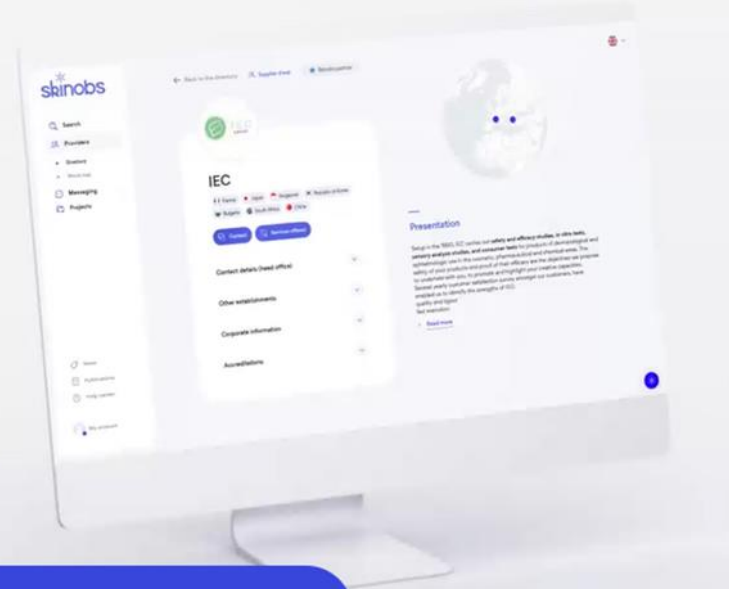


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# THANK YOU FOR YOUR ATTENTION

## BRAZILIAN BEAUTY TESTING TRENDS 2024



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Leila Bloch



👉 Next Webinar around Asian Testing trends  
14 November 10 AM



October 3<sup>rd</sup>, 2024  
Anne Charpentier  
acharpentier@skinobs.com

