

Ariana Estevao  
specialist in the study of Brazilian hair

Worked for over 20 years in the cosmetics market.

First with strategic planning at Johnson & Johnson.

Developed a strong background in product innovation at Natura&Co,  
Natura Brazil and Natura Argentina.

Later, in Marketing at L'oreal, worked in the professional hair products division,

Worked together with the international division and  
launched several products for coloring, treatment and relaxation.

Salus Cosmetic Founding partner.

Strategy and marketing professional with international experience.

Graduated in business administration from PUC-SP,  
with an MBA in Marketing from ESPM-SP and University Extension at  
Business School SP and California State University Northridge

the beauty of the  
hair care market  
in Brazil

The year 2023 marked Brazil's return to the top 3 of the global hair care market, surpassing Japan and behind only the United States and China, reaching R\$28.2 (USD 6) billion in sales, an increase of no less than 11.9% compared to the previous year, according to Euromonitor International.

The result was higher than the global growth (4.4%). Euromonitor's forecasts also indicate that the increase in Brazilian consumption of hair care products will remain above the global growth in the coming years.

While the global market is expected to grow 35.1% by 2028, in Brazil, this rate will be 54.5%, totaling R\$43.6 billion.

**Brazilian Hair Care Industry Overview** The Brazilian Hair Care market is competitive, owing to the presence of large regional and domestic players. Emphasis is given to the merger, expansion, acquisition, and partnership of the companies and new product development as strategic approaches adopted by the leading companies to boost their brand presence among consumers.

### Brazilian Hair Care Market Leaders

- 1 Proctor and Gamble
- 2 L'Oréal S.A.
- 3 Johnson & Johnson
- 4 Natura & Co
- 5 Unilever PLC

\*Disclaimer: Major Players sorted in no particular order

#### Market Concentration



Source: Mordor Intelligence



hair

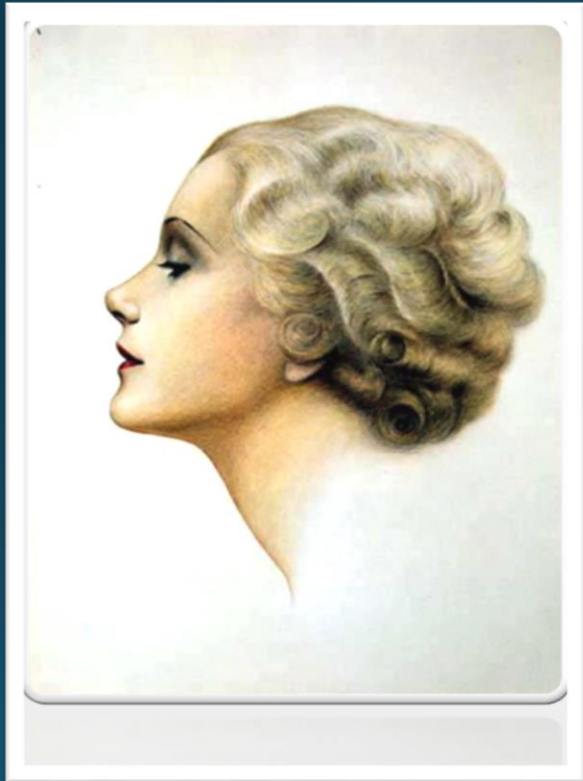
social context

1900...

**HALL'S VEGETABLE SICILIAN HAIR RENEWER**

THICKENS THE GROWTH OF THE HAIR. PREVENTS BALDNESS. CURES DANDRUFF, AND RESTORES GRAY HAIR TO ITS ORIGINAL COLOR AND BEAUTY.

H. R. HALL & CO. PHILADELPHIA, PA.



*How Famous Movie Stars Keep their Hair Beautiful*

**POOR COMBING** is one of the worst hair enemies. It irritates the scalp and breaks the hair, and makes it soft, dry and brittle.

There are many ways to keep your hair beautiful, but it cannot match the lasting effect of ordinary soap. The best effect is achieved when, after the hair is washed, it is treated with a good hair oil.

**WATKINS' MULSIFIED COCOANUT OIL SHAMPOO**

It is a perfect hair conditioner. It keeps the hair soft and pliable, and it makes the hair shine and look like silk. It is a perfect hair oil substitute.

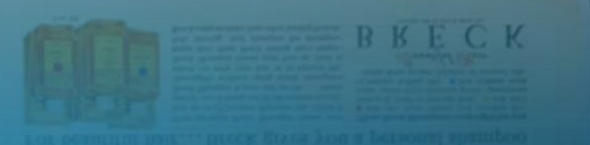
WATKINS' MULSIFIED COCOANUT OIL SHAMPOO

WATKINS

**For beautiful hair... Breck gives you a personal shampoo**

These Breck Shampoos... are right for you. They are pure - clean and gentle. They are designed to bring out the natural beauty of your hair. They are gentle on the scalp and give you a clean, healthy, and beautiful hair. They are the only shampoos that keep your hair soft and pliable. They are the only shampoos that keep your hair shiny and lustrous. They are the only shampoos that keep your hair from becoming dry and brittle. They are the only shampoos that keep your hair from becoming dull and lifeless. They are the only shampoos that keep your hair from becoming thin and falling out. They are the only shampoos that keep your hair from becoming gray and old. They are the only shampoos that keep your hair from becoming dull and lifeless. They are the only shampoos that keep your hair from becoming thin and falling out. They are the only shampoos that keep your hair from becoming gray and old.

**Beautiful Hair BRECK**





1930 ...



Jünger und schöner durch  
**WELLA**  
Dauerwellen

WELLA



Juno était brune... Vénus était blonde...

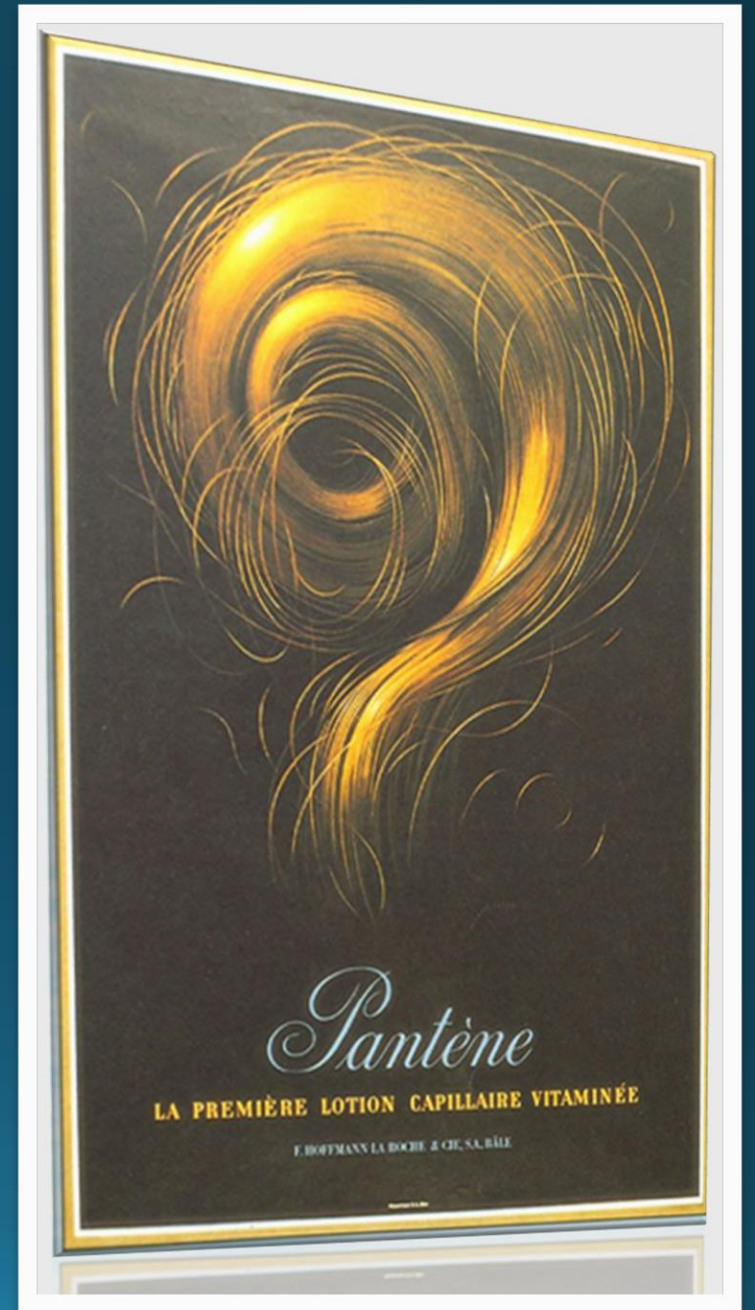
Les déesses d'aujourd'hui, stars de cinéma et grandes élégantes, sont « BLOND-PLATINE ».

Couleur idéale, couleur de rêve, longtemps cherchée, enfin découverte, qui dévoile le charme des jolis visages en unissant la longueur des blondes à la vivacité des brunes.

« BLOND-PLATINE », qui « élève » à jamais la couleur qui l'adopte, peut être obtenu sans aucun danger pour vos cheveux et votre cuir chevelu en utilisant L'ORÉAL BLANC, à condition d'en demander l'application à votre Coiffeur.

**L'ORÉAL BLANC**

Madame M. S.,  
désolée à  
**L'ORÉAL BLANC**



*Pantène*

LA PREMIÈRE LOTION CAPILLAIRE VITAMINÉE

F. BOFFMANN LA ROCHE & CIE, S.A. RILE

1950..



## SUPREME

THE SUBTLE INFLUENCE OF  
**EVAN WILLIAMS SHAMPOO**  
GIVES REFINEMENT, CHARM  
AND DISTINCTION TO THE  
HAIR—A DEGREE OF BEAUTY  
UNATTAINABLE IN ANY  
OTHER WAY.

IT MUST BE **EVAN WILLIAMS  
SHAMPOO.**

"ORDINARY" Grade for Dark Hair.

"CAMOMILE" Grade for Fair Hair.

OF ALL CHEMISTS & HAIRDRESSERS 4d.

## EVAN WILLIAMS SHAMPOO

● WRITE FOR "MY STORY" BOOKLET  
Dept. P.W., EVAN WILLIAMS CO., LTD.,  
14 UNION STREET, LONDON, W.1.



*Nunca seus cabelos  
terão sido  
mais brilhantes,  
macios, adoráveis...*

### SHAMPOO OVO-CREME de Richard Hudnut

Esse maravilhoso shampoo contém as proteínas naturais do ovo, que são comprovadamente benéficas.

Shampoo Ovo-Creme de Richard Hudnut limpa magicamente o seu cabelo... deixando-o tão suave... tão macio! Shampoo Ovo-Creme de Richard Hudnut dá ao cabelo um novo brilho, sem deixar aquela película de "sabão" que tanto irrita.

Este é o segredo de tantas cabecinhas lindas, que ostentam os mais adoráveis e maravilhosos cabelos, graças ao Shampoo Ovo-Creme de Richard Hudnut!

SHAMPOO OVO-CREME DE  
Richard Hudnut





1960...



**wellaton**  
o shampoo-creme  
que lava colorindo!

**WELLA AG · DARMSTADT**  
**WELLA · PORTUGAL**  
Av. Duque de Avila, 46 — Telef. 48127/3236 — LISBOA-I  
Praça da Batalha, 92 — Telefone 30602 — PORTO

Wundervoll ist mein Haar  
geworden!



Auch sitzt die Frisur viel besser! Alles  
durch die erfolgreiche Haarpflege mit

**Wella-Kolestral**

1970...

# por você mais do que outro cosmético

**1** A começar pelo shampoo. SEDA tem um especial para você, seja qual for seu tipo de cabelo: normal, seco, oleoso, cacheado ou lizo.

E para os cabelos rebeldes e resacasos, recomendamos o novo SEDA SHAMPOO E RINSE. Misture as substâncias e massageie com o seu SEDA shampoo. Logo que ele começa a penetrar nos cabelos, você vai sentir que eles se tornam macios e desobedientes.



**2** Simplemente RINSE com o SEDA. Isso vai fazer com que os cabelos se tornem macios, e depois de SEDA, os cabelos ficam mais fortes e mais brilhantes. E depois de SEDA, os cabelos ficam mais fortes e mais brilhantes.



**3** Busca cosmética com SEDA. Isso vai fazer com que os cabelos se tornem macios, e depois de SEDA, os cabelos ficam mais fortes e mais brilhantes.



Seda - Shampoo, Creme Rinse, Hair Spray



## Seda Shampoo e Seda Creme Rinse dão um conjunto de beleza pra você.

Um secador Braun Styler e um modelador Braun Creatif.

Esta é mais uma promoção sensacional de Seda pra você. Encontrando o vale-brinde nos frascos de Seda, e comprando 4 frascos de Seda, o conjunto é seu. E os prêmios são demais. O conjunto é formado por produtos de qualidade excepcional e de grande utilidade pra você. Com o secador, não existem mais cabelos "com aquelas" e prontos para pentear. Com o modelador, você cria os seus lindos e desejados penteados naturais. São conjuntos de beleza esperando por você no concurso de Seda. Um deles pode ser seu.



Use Seda. Encontre o vale-brinde e ganhe.



2000...

The focus shifts to Hair Treatment.

Intense diversification of products and treatments begins.

Relaxers, straighteners and progressive treatments arrive in Brazil.



# What we want





# What will come next



“Consumer knowledge of ingredients is driving a shift in the most desired features of hair care,” says Connor Spicer, senior research analyst at Euromonitor International. As for the hair care shield trend, there is a notable commitment from raw material suppliers to offer innovative ingredients that effectively preserve health, repair and shield against a variety of types of damage. Cosmetic Innovation



Thank you !

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