



Beauty and Personal Care in Uruguay

April 2024

Table of Contents

Beauty and Personal Care in Uruguay

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2018-2023

Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023

Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2018-2023

Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

APPENDIX

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cross-border shopping results in falling volume sales and muted value growth

Pharmacies consolidates its leadership in the retailing of baby and child-specific products

Johnson & Johnson leads sales due to wide distribution and competitive pricing

PROSPECTS AND OPPORTUNITIES

Demand for more natural products set to continue rising during the forecast period

Opportunities for emerging brands as price increasingly influences purchasing decisions

Uruguay's low birth rate could pose a threat to category growth

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2018-2023

Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023

Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023

Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023

Table 16 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

Table 17 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

Table 18 - Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028

Table 19 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

Table 20 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

Bath and Shower in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bath and shower sees a contraction in volume and current value sales
Products with natural ingredients continue to gain ground in bath and shower
Unilever and Colgate-Palmolive retain their strong leadership via wide distribution

PROSPECTS AND OPPORTUNITIES

Innovation and differentiation key elements for ongoing sales growth in bath and shower
Supermarkets set to remain the most important distribution channel for bath and shower
E-commerce set to emerge as a major new distribution channel in bath and shower

CATEGORY DATA

Table 21 - Sales of Bath and Shower by Category: Value 2018-2023
Table 22 - Sales of Bath and Shower by Category: % Value Growth 2018-2023
Table 23 - Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023
Table 24 - NBO Company Shares of Bath and Shower: % Value 2019-2023
Table 25 - LBN Brand Shares of Bath and Shower: % Value 2020-2023
Table 26 - LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023
Table 27 - Forecast Sales of Bath and Shower by Category: Value 2023-2028
Table 28 - Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028
Table 29 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

Colour Cosmetics in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Another year of positive volume growth for colour cosmetics
L'Oréal benefits from the launch of its new product Revitalift Retinol
Pharmacies consolidates its leading position as direct selling loses ground

PROSPECTS AND OPPORTUNITIES

Direct sellers to modify their sales strategies to recover ground lost to the informal trade
Innovation, sustainability, and promotions to remains key spurs on sales growth
Social media set to become a more important tool for the marketing of colour cosmetics

CATEGORY DATA

Table 30 - Sales of Colour Cosmetics by Category: Value 2018-2023
Table 31 - Sales of Colour Cosmetics by Category: % Value Growth 2018-2023
Table 32 - Sales of Colour Cosmetics by Premium vs Mass: % Value 2018-2023
Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2019-2023
Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2020-2023
Table 35 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023
Table 36 - Forecast Sales of Colour Cosmetics by Category: Value 2023-2028
Table 37 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028
Table 38 - Forecast Sales of Colour Cosmetics by Premium vs Mass: % Value 2023-2028

Deodorants in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales of deodorants continue to fall due to competition from cross-border trade
The popularity of natural and organic deodorants continues to grow

Unilever confirms its dominant leadership in deodorants

PROSPECTS AND OPPORTUNITIES

Price promotions to prove crucial as deodorants faces challenges from the cross-border trade

The appeal of more natural and sustainable products set to continue growing

Economic stability in Argentina to curb influence of cross-border shopping and informal trade

CATEGORY DATA

Table 39 - Sales of Deodorants by Category: Value 2018-2023

Table 40 - Sales of Deodorants by Category: % Value Growth 2018-2023

Table 41 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023

Table 42 - NBO Company Shares of Deodorants: % Value 2019-2023

Table 43 - LBN Brand Shares of Deodorants: % Value 2020-2023

Table 44 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023

Table 45 - Forecast Sales of Deodorants by Category: Value 2023-2028

Table 46 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028

Table 47 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for depilatories falls for the third consecutive year due to cross-border activity

Leading brands continue to focus on added value and benefits such as ease of use

Sebamar SA, Carrau & Cia and Karinda Ltda lead sales by representing global brands

PROSPECTS AND OPPORTUNITIES

Pharmacies set to extend its lead and remain the preferred retail channel for depilatories

Emergence of e-commerce presents opportunities to boost demand for depilatories

More targeted products set to drive sales growth in hair removers/bleaches

CATEGORY DATA

Table 48 - Sales of Depilatories by Category: Value 2018-2023

Table 49 - Sales of Depilatories by Category: % Value Growth 2018-2023

Table 50 - NBO Company Shares of Depilatories: % Value 2019-2023

Table 51 - LBN Brand Shares of Depilatories: % Value 2020-2023

Table 52 - Forecast Sales of Depilatories by Category: Value 2023-2028

Table 53 - Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

Fragrances in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for fragrances continues to rise due to less influence from cross-border trade

The retail distribution of fragrances expands throughout Uruguay as e-commerce booms

L'Oréal is strong in premium fragrances, while direct seller Natura is strong in the mass segment

PROSPECTS AND OPPORTUNITIES

Rising demand for premium fragrances to underpin positive volume and value growth

Omnichannel strategies set to become a more important driver of growth in fragrances

Promotional strategies are set to continue developing strongly to attract consumers

CATEGORY DATA

Table 54 - Sales of Fragrances by Category: Value 2018-2023

Table 55 - Sales of Fragrances by Category: % Value Growth 2018-2023

Table 56 - NBO Company Shares of Fragrances: % Value 2019-2023

Table 57 - LBN Brand Shares of Fragrances: % Value 2020-2023

Table 58 - LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023

Table 59 - LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

Table 60 - Forecast Sales of Fragrances by Category: Value 2023-2028

Table 61 - Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

Hair Care in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hair care experiences a significant contraction in demand as cross-border sales bite

Garnier Fructis launches new line of vegan shampoos in response to evolving demand

Global names L'Oréal, Procter & Gamble and Unilever dominate sales in hair care

PROSPECTS AND OPPORTUNITIES

Dermocosmetic brands exhibit particularly strong growth potential

The incorporation of skin care attributes in hair care products to gain further ground

The focus on quality over quantity is set to continue defining hair care

CATEGORY DATA

Table 62 - Sales of Hair Care by Category: Value 2018-2023

Table 63 - Sales of Hair Care by Category: % Value Growth 2018-2023

Table 64 - Sales of Hair Care by Premium vs Mass: % Value 2018-2023

Table 65 - NBO Company Shares of Hair Care: % Value 2019-2023

Table 66 - LBN Brand Shares of Hair Care: % Value 2020-2023

Table 67 - NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023

Table 68 - LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023

Table 69 - LBN Brand Shares of Premium Hair Care: % Value 2020-2023

Table 70 - Forecast Sales of Hair Care by Category: Value 2023-2028

Table 71 - Forecast Sales of Hair Care by Category: % Value Growth 2023-2028

Table 72 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men's fragrances bucks negative general sales trend by registering strong sales growth

Men's toiletries sees significant volume sales contraction due to cross-border trade

Sebamar remains dominant in men's shaving via its representation of the Gillette brand

PROSPECTS AND OPPORTUNITIES

Opportunity for emerging brands to gain space in a more segmented category

Social media to become a more important tool for attracting and influencing consumers

Pharmacies set to remain the most relevant distribution channel for men's grooming

CATEGORY DATA

Table 73 - Sales of Men's Grooming by Category: Value 2018-2023

Table 74 - Sales of Men's Grooming by Category: % Value Growth 2018-2023

Table 75 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023

Table 76 - Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023

Table 77 - NBO Company Shares of Men's Grooming: % Value 2019-2023

Table 78 - LBN Brand Shares of Men's Grooming: % Value 2020-2023

Table 79 - LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023

Table 80 - Forecast Sales of Men's Grooming by Category: Value 2023-2028

Table 81 - Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

Oral Care in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for oral care continues to contract due to the cross-border trade

Consumers seek out more effective toothpaste brands with specific ingredients

Colgate-Palmolive maintains its lead thanks to its reputation for innovation and prestige

PROSPECTS AND OPPORTUNITIES

Organic products and those with natural ingredients set to continue attracting consumers

Promotions and discounts to be key planks of efforts to combat the cross-border trade

Supermarkets to remain the leading retail channel for oral care, followed by pharmacies

CATEGORY DATA

Table 82 - Sales of Oral Care by Category: Value 2018-2023

Table 83 - Sales of Oral Care by Category: % Value Growth 2018-2023

Table 84 - Sales of Toothbrushes by Category: Value 2018-2023

Table 85 - Sales of Toothbrushes by Category: % Value Growth 2018-2023

Table 86 - Sales of Toothpaste by Type: % Value Breakdown 2019-2023

Table 87 - NBO Company Shares of Oral Care: % Value 2019-2023

Table 88 - LBN Brand Shares of Oral Care: % Value 2020-2023

Table 89 - Forecast Sales of Oral Care by Category: Value 2023-2028

Table 90 - Forecast Sales of Oral Care by Category: % Value Growth 2023-2028

Table 91 - Forecast Sales of Toothbrushes by Category: Value 2023-2028

Table 92 - Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive volume and value growth supported by rising demand for premium brands

Skin care products with a dermocosmetic positioning continue to gain ground

L'Oréal further extends its lead in skin care as it capitalises on the dermocosmetics trend

PROSPECTS AND OPPORTUNITIES

The importance of pharmacies for sales of skin care set to continue increasing

Brands will have to work harder to attract the attention of increasingly sophisticated consumers

E-Commerce and the omnichannel approach set to offer distinct advantages

CATEGORY DATA

Table 93 - Sales of Skin Care by Category: Value 2018-2023

Table 94 - Sales of Skin Care by Category: % Value Growth 2018-2023

Table 95 - NBO Company Shares of Skin Care: % Value 2019-2023

Table 96 - LBN Brand Shares of Skin Care: % Value 2020-2023

Table 97 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023

Table 98 - Forecast Sales of Skin Care by Category: Value 2023-2028

Table 99 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sun care continues to recover despite major slowdown in volume growth

Preference for premium products drives value growth in sun care

Urufarma leads sales in sun care, closely followed by L'Oréal Groupe

PROSPECTS AND OPPORTUNITIES

The trend towards more natural and sustainable products set to continue building

Sales of sun care products with a dermocosmetic positioning set to continue growing

Pharmacies set to continue emerging as an important distribution channel for sun care

CATEGORY DATA

Table 100 - Sales of Sun Care by Category: Value 2018-2023

Table 101 - Sales of Sun Care by Category: % Value Growth 2018-2023

Table 102 - Sales of Sun Care by Premium vs Mass: % Value 2018-2023

Table 103 - NBO Company Shares of Sun Care: % Value 2019-2023

Table 104 - LBN Brand Shares of Sun Care: % Value 2020-2023

Table 105 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023

Table 106 - Forecast Sales of Sun Care by Category: Value 2023-2028

Table 107 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium beauty and personal care continues to grow in volume and value terms

E-commerce emerges strongly as a useful tool to attract the attention of consumers

L'Oréal is the leading premium player due to its advantageous position in pharmacies

PROSPECTS AND OPPORTUNITIES

New omnichannel distribution strategies to influence the category's development

Social media an increasingly vital tool for boosting sales growth for premium brands

Premium brands set to continue sharpening their focus on high quality and sustainability

CATEGORY DATA

Table 108 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023

Table 109 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 110 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023

Table 111 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023

Table 112 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028

Table 113 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in Uruguay

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales contract across key mass beauty and personal care categories

Huge growth in sales of mass brands with dermo positioning in skin care and sun care
Solid volume growth for mass colour cosmetics as pre-pandemic lifestyles return

PROSPECTS AND OPPORTUNITIES

Opportunities for mass dermocosmetic brands to grow after years of robust growth
The distribution of mass brands to focus on beauty specialists and omnichannel retailing
Pharmacies set to remain the most important distribution channel for mass brands

CATEGORY DATA

Table 114 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023

Table 115 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 116 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023

Table 117 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023

Table 118 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028

Table 119 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-uruguay/report.