

Men's and Women's Fragrances - Brazil - February 2013

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“The challenge that newcomers to the market face is huge; it is extremely important for companies to be prepared to adapt in order to meet Brazilians’ unique demands and preferences, with competitive prices. It is also crucial for international companies not to underestimate the quality and strength of national brands.”

– Iris Ramirez, Senior Analyst of Beauty and Personal Care

In this report we answer the key questions:

- What are the current opportunities in the world's biggest fragrance market?
- What obstacles do international competitors face in the Brazilian fragrance market?
- How does the sophistication of consumption create opportunities for new launches and innovations?
- How does the competition between sales channels change the competitive landscape?
- What channels do consumers in different demographics value the most?
- Are there still opportunities to increase a consumption that is already high?
- How can the demands of Brazilian consumers be met with targeted products and campaigns?

Brazil has conquered the world's top position in sales revenues in the fragrance market.

The fragrance category, in addition to having high penetration, is part of the daily hygiene and beauty routine of Brazilians, and usage levels are higher than in other countries. While just more than half of female British consumers wear fragrances daily, more than 70% of female Brazilians do not leave their homes without it.

Despite the market dominance of direct sales, retail sales are growing through various formats, such as drug stores, national franchises, and famous international stores. This resulted in a decline of direct sales by 6% between 2007 and 2011, while franchises already represent almost 30% of the total turnover of the fragrance market.

National and local brands dominate the Brazilian market, with only three companies being responsible for just more than half of the category's revenues. The challenge that newcomers to the market face is huge; it is extremely important for companies to be prepared to adapt in order to meet Brazilians' unique demands and preferences, with competitive prices. It is also crucial for international companies not to underestimate the quality and strength of national brands

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