“33% of the Brazilians interviewed said they use suncare products every day, including during the winter. However, 35% of them said they often forget to apply them. Explaining the risks of sun exposure and educating them to use sunscreens daily, and not just during the summer, are still big challenges for brands of suncare products in Brazil.”

- Juliana Martins, Beauty and Personal Care Analyst

This report looks at the following areas:

- How to communicate skin cancer risk factors
- How to attract consumers who seek rapid absorption products
- How to attract consumers toward products with oil formats

The suncare products market has suffered greatly since the economic recession started in Brazil in 2015, when the category value dropped 1.9% compared to the previous year, reaching R$ 2.18 billion in revenue, according to Mintel’s data – the market should grow by 4.2% in 2016. Still seen as a seasonal use category, these products face some challenges to meet the expectations of the Brazilian consumers, such as rapid absorption, high SPF and at the same time light sensory, dry touch and affordable prices.
Suncare - Brazil - December 2016

Overview

Definition

Executive Summary

The market

Market should grow in the next years despite 2015 fall

Figure 1: Forecast of retail sales of suncare products*, by value – Brazil, 2011-21

Market Share

Three leaders have a bit more than 50% of market share

Figure 2: Leading companies’ sales shares in the retail suncare market*, by value – Brazil, 2014-15

The consumer

Suncare products are still associated with seasonal use

Figure 3: Frequency of use – Brazil, July 2016

Electronic devices can increase use of sun protectors

Figure 4: Barriers of use – Brazil, July 2016

Benefit of unblocking skin pores can increase use of lotion formats

Figure 5: Attitudes toward formats (cream/lotion) – Brazil, July 2016

Products with too high SPF may affect its sensory factor

Figure 6: Purchase influences – Brazil, July 2016

What we think

Issues and Insights

How to communicate skin cancer risk factors

The facts

The implications

How to attract consumers who seek rapid absorption products

The facts

The implications

How to attract consumers toward products with oil formats

The facts

The implications

The Market – What you need to know

Market fall in 2015 was due to the economic recession

Products with high SPF and in spray format can boost the category

Aging population and economic improvement can influence the market

Market and forecast

Category felt the impact of the economic recession in 2015

Figure 7: Retail sales of suncare products*, by value – Brazil, 2011-21

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Figure 8: Retail sales of suncare products, by value, by segment – Brazil, 2014-15

Innovations should boost the market growth

Figure 9: Forecast of retail sales of suncare products*, by value – Brazil, 2011-21

Market drivers

Elderly population rapidly increasing rapidly in Brazil
High SPF may be a barrier for the Brazilian consumers
Economic recession should slow down in the coming years

Key Players – What you need to know

Sundown is the market leader’s main brand
Beiersdorf ranked second in market share in 2015
La Roche Posay Anthelios is one of the best sellers

Market share

Three main leaders have a bit more than 50% market share

Figure 10: Leading companies’ sales share in the retail suncare market*, by value – Brazil, 2014-15

Who’s innovating?

Launches of dermatologically tested products are still rare in Brazil

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Few suncare products launches in 2016 had a "long lasting" positioning

Figure 12: Launches of suncare products positioned as "long lasting," by top 5 countries and brazil, 2013-October 2016

Waterproof products are not very present among launches in Brazil

Figure 13: Launches of suncare products positioned as "long lasting," by top 5 countries, 2013-October 2016

The Consumer – What you need to know

Category still is associated with seasonal use
High prices and scents of some products can pose barriers
Brazilians have different perceptions on products in lotion, oil and gel
Purchase influences are linked to price and benefits

Frequency of use

Suncare products are associated with seasonal use

Figure 14: Frequency of use – Brazil, July 2016

Self-tanning products have good opportunities during the winter
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Barriers of use

Electronic devices can boost sun protection use

Figure 17: Barriers of use – Brazil, July 2016

Women aged 25-34 can be interested in other formats

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Figure 18: Barriers of use, agreement with the statement “Suncare products are usually too expensive,” by age – Brazil, July 2016

Young consumers may be attracted by multi-function products

Figure 19: Barriers of use, agreement with the statement “I don’t like the smell of suncare products,” by gender and age – Brazil, July 2016

Benefit of unblocking pores can boost lotion format use

Figure 20: Attitudes towards formats (cream/lotion) – Brazil, July 2016

Brazilians can improve their perception of oil or gel products

Figure 21: Attitudes toward formats, by ‘quick to apply’ benefit – Brazil, July 2016

Products in gel format can appeal to men

Figure 22: Attitudes toward formats, by ‘leaves the skin feeling fresh’ benefit – Brazil, July 2016

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Products with too high SPF may affect its sensory factor

Figure 23: Purchase influences – Brazil, July 2016

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Figure 24: Purchase influences, by men – Brazil, July 2016

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Figure 25: Purchase influences, by ‘low priced’ attribute – Brazil, July 2016

Appendix – Market Size and Forecast

Figure 26: Retail sales of suncare products*, by value – Brazil, 2011-21

Figure 27: Forecast of retail sales of suncare products*, by value – Brazil, 2011-21

Figure 28: Retail sales of suncare products, by value, by segment – Brazil, 2014-15

Abbreviations