

Haircare: Incl Impact of COVID-19 - Brazil - April 2020

Report Price: £3265 | \$4495 | €3940

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- How the COVID-19 outbreak impacts consumer behaviors and the haircare products market as a whole
- How the market will fare the post-COVID-19 slowdown
- Consumers' haircare behaviors and usage of products
- Launch activity and consumer interest in innovation

In the short term, haircare routines in Brazil, especially the frequency with which they wash their hair, are not expected to be impacted by COVID-19, thus hygiene habits related to the hair will keep hair products consumption at a stable level. Additionally, the subsequent deepening of an economic recession will push consumers to do more salon treatments at home, so hair color products will be leveraged further as a cost-saving response to the tightening of purse strings. That said, hair coloring products in Brazil have an opportunity to improve, becoming easier and more convenient to use through the introduction of new formats and customized formulas. Hair treatments that tap into the need for self-care will also be more relevant to consumers, especially in the short- and medium-term where anxiety levels are high.

In the medium and longer term, tight budgets and hesitancy among some to return to the salon will continue to boost the need for products and services that replicate the salon experience and extend time between services. As consumers adjust to doing more at home, they will look to brands for guidance and solutions, which could raise brand awareness and consumer loyalty. A personalized user experience including customized formulas, online resources, and safe but efficacious formulas (ie straightening products without formaldehyde) will be imperative for driving longer-term success.



“The haircare market is one of the most important categories for Brazilian consumers, who have adopted a more natural look. As a consequence, the demand for products that offer not only beauty benefits but also healthy attributes for the hair and scalp grows consistently.”

– Amanda Caridad, Beauty and Personal Care Senior Specialist

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- What you need to know
- Key issues covered in this Report
- Definition

EXECUTIVE SUMMARY

- Challenges
- COVID-19 can negatively impact the personal care industry's performance
- Haircare market has the challenge of offering a greater variety of products to men with curly hair
- Generation Z consumers are more concerned about price
- As resources run low, brands are challenged to develop water-smart products
- Opportunities
- Purifying shampoos for daily use can appeal to those with straight hair
- Hair oils and other finishing products can offer the benefit of scalp hydration
- There are opportunities for pre-shampoos designed to improve the health of the oily scalp
- Hair serum can be a convenient alternative to leave-in conditioners
- What we think

THE IMPACT OF COVID-19 ON HAIRCARE

Figure 1: Short, medium and long term impact of COVID-19 on haircare, April 2020

- Opportunities and Threats
- Need for hair protection rises amid COVID-19
- Consumers need help coloring their hair at home
- Hair treatments at home help consumers to de-stress
- Impact on the haircare market
- Demand for gel alcohol impacts production of haircare products
- COVID-19 and economic recession increase raw materials price
- How the crisis will affect haircare's key consumer segments
- Gen Z have higher unemployment rates and are more price-sensitive
- Women can be empowered by their grey hair

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3265 | \$4495 | €3940

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Brands can offer affordable and safe products for consumers with chemically straightened hair
- How a COVID-19 recession will reshape the haircare industry
- Haircare salon business is likely to be negatively impacted
- Indie brands continue to gain traction
- DIY haircare recipes may inspire the industry
- Social media can strengthen brand engagement with consumers
- Social media can strengthen brand engagement with consumers
- COVID-19: Brazil context

MARKET DRIVERS

- COVID-19 knocks down Brazil's GDP forecast
- Unemployment and informal work fall, but the number of people out of the job market hits record
- Currency devaluation may raise prices of personal hygiene and personal care products
- Cosmetics, toiletry and fragrance industry registers moderate growth

KEY PLAYERS – WHAT YOU NEED TO KNOW

- Unilever and L'Oréal launch vegan brands, while Natura's acquisition of Avon changes the market
- Brands invest in products for curly hair and repair solutions
- Fast-rinse products appeal to consumers engaged with the environment
- Family-owned businesses Only Curls and Patricks bring innovation, while Unilever reaffirms its global commitment to sustainability

MARKET SHARE

- Unilever and L'Oréal launch vegan brands, while Natura's acquisition of Avon changes the market
Figure 2: Leading companies' retail sales share of shampoos and conditioners, by value – Brazil, 2017-18
- Market leaders offer technological innovations and vegan solutions in the hair coloring segment
Figure 3: Leading companies' retail sales share of hair coloring products, by value – Brazil, 2017-18

MARKETING CAMPAIGNS AND ACTIONS

- Pantene launches Hair Mask

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3265 | \$4495 | €3940

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 4: Pantene Hair Mask, Brazil, March 2020

- **Palmolive launches new range for curly hair**

Figure 5: Palmolive Free Curls, Brazil, February 2020

- **L'Occitane offers customization with new hair mask range**

Figure 6: L'Occitane en Provence offers new customizable hair mask range, Brazil, February 2020

- **Boticário launches new haircare brand**

Figure 7: O Boticário EUME, Brazil, February 2020

Figure 8: EUME | #MeuCabeloÉMuitoEu | Whindersson Nunes

- **Haircare - Brazil - April 2018 Natura launches new range for dry hair**

Figure 9: Natura's new range for dry hair offers deep nutrition, Brazil, January 2020

Figure 10: Natura's campaign on Instagram, Brazil, January 2020

- **Monange launches new range that refers to a haircare routine**

Figure 11: Monange launches haircare schedule, Brazil, January 2020

- **Ricca launches hair mask with superfoods**

Figure 12: Ricca A Fantástica Máscara de Chocolate Frutas Vermelhas & Chocolate (Red Fruits & Chocolate Fantastic Chocolate Hair Mask), Brazil, January 2020

- **Embelleze relaunches vegan hair coloring product**

Figure 13: Embelleze launches hair coloring product with vegan formulation, Brazil, October 2019

- **Salon Line launches haircare range for children with straight hair**

Figure 14: The Salon Line Meu Lisinho Kids Salada de Frutas (My Straight Kids Fruit Salad)

- **Skala offers eco-friendly products**

Figure 15: Skala presents The Gardener, Brazil, September 2019

- **Dove sponsors Hair Love, an Oscar-winning production**

Figure 16: "Hair Love," US, February 2020

WHO'S INNOVATING?

- **Haircare market can invest in fast-rinse products**

Figure 17: Total launches of haircare products with both "time/fast" and "ethical/environment" claims – top 5 countries, 2017-19

Figure 18: "What are the benefits of fast-rinse conditioners?" Love Beauty and Planet

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3265 | \$4495 | €3940

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 19: Haircare products that offer fast rinse
Figure 20: Boticário launches IARA tool on World Water Day, Brazil, March 2019

- **Hair coloring brands can explore ingredients from the Amazon**

Figure 21: Total launches of hair coloring products with "natural" related claims – global, 2017-19
Figure 22: "Botanical/Herbal" hair coloring products
Figure 23: Laces and Hair launches plant-based coloring product, Brazil, April 2019

CASE STUDIES

- **Only Curls forecasts \$1.6 million in revenues three years after launching**

Figure 24: Before/after photos reveal the reason why Only Curls has been successful in the UK
Figure 25: Only Curls products are developed for curly and frizzy hair

- **Unilever reaffirms its commitment to reducing the use of plastic and engages consumers in Mexico**

Figure 26: Sedal refilling station, Mexico, November 2019

- **Australian start-up Patricks develops products for men combining technology and design**

Figure 27: Patricks M2 Matte Finish Medium Hold
Figure 28: Patricks M2 Hair Product Matte Finish Medium Hold, US, January 2017

THE CONSUMER – WHAT YOU NEED TO KNOW

- **A third of Brazilians have straight hair**
- **Brands can offer scalp products with unusual textures**
- **Shampoo brands should consider hair washing frequency**
- **Fast drying can appeal to students**
- **Adaptogens can provide wellbeing and alleviate stress**
- **Coily hair needs damage-free lightening solutions**
- **The health of the scalp is an important attribute for consumers who straighten their hair**

HAIR TEXTURE

- **Purifying shampoos for daily use can appeal to those with straight hair**

Figure 29: Hair texture – Brazil, January 2020
Figure 30: Products with benefits that appeal to people with straight hair

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3265 | \$4495 | €3940

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Haircare market has the challenge of offering a greater variety of products to men with curly hair**

Figure 31: Hair texture, by gender – Brazil, January 2020

Figure 32: Products for men with curly hair

- **Women with wavy hair want straighter hair**

Figure 33: Female hair texture – Brazil, January 2020

Figure 34: Hair strengthening treatments

SCALP TYPES

- **Central-West region concentrates most consumers with oily scalp**

Figure 35: Scalp types, by region – Brazil, January 2020

Figure 36: Products for oily scalp

- **Hair oils and other finishing products can offer the benefit of scalp hydration**

Figure 37: Scalp types, by hair texture – Brazil, January 2020

Figure 38: Products that offer dry scalp hydration

CONSUMER BEHAVIORS ON HAIR WASH

- **Dry shampoo can attract consumers from the North-East region who want to keep their hair clean and hydrated between washes**

Figure 39: Consumer behaviors on hair wash, by region – Brazil, January 2020

Figure 40: No-rinse cleansing alternatives

- **Men may be interested in shampoos that offer gentle cleaning**

Figure 41: Consumer behaviors on hair wash, by gender – Brazil, January 2020

Figure 42: Yakult Beautiens Lamine S.E. Shampoo features milk extract fermented with lactic acid bacteria, Japan, March 2020

- **Brands can offer curl combing creams to consumers who don't wash their hair daily**

Figure 43: Consumer behaviors on hair wash, by hair texture – Brazil, January 2020

Figure 44: Products for curly hair that improve definition and hydration

BARRIERS TO WASHING HAIR DAILY

- **Students want fast-drying products**

Figure 45: Barriers to washing hair daily, students – Brazil, January 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 46: Aveda Speed of Light Spray Accélérateur de Séchage (Speed of Light Blow Dry Accelerator Spray), US, January 2019

- **Partnerships with beauty experts can help brands educate customers via social media**

Figure 47: Barriers to washing hair daily, by age group and gender – Brazil, January 2020

Figure 48: All Things Hair, Brazil, March 2017

- **Generation Z can be motivated to buy haircare products with discounts and offers of free beauty services**

Figure 49: Barriers to washing hair daily, by age group and gender – Brazil, January 2020

HAIRCARE PRODUCTS USED

- **There are opportunities for pre-shampoos designed to improve the health of the oily scalp**

Figure 50: Haircare products used, by selected product and scalp type – Brazil, January 2020

Figure 51: Pre-shampoos that offer hydration and damage prevention

- **Hair oils with Brazilian ingredients have the potential to attract AB consumers**

Figure 52: Haircare products used, by selected product and socioeconomic group – Brazil, January 2020

Figure 53: Hair oils with Brazilian ingredients

- **Hair serum can be a convenient alternative to leave-in conditioners**

Figure 54: Haircare products used, by selected product, age and gender – Brazil, January 2020

Figure 55: Mise en Scène Perfect Serum Coco Water Serum, Japan, February 2020

INGREDIENTS SOUGHT IN HAIRCARE PRODUCTS

- **Adaptogens can be used in haircare products for stress relief**

Figure 56: Ingredients sought in haircare products – Brazil, January 2020

Figure 57: Haircare products formulated with foods that fight stress

- **Consumers with more fragile hair can benefit from products containing probiotics**

Figure 58: Ingredients sought in haircare products, by hair texture – Brazil, January 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3265 | \$4495 | €3940

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 59: Aveeno Kefir Probiotic Blend Shampoo, US, January 2020

- **Brands may address the different types of hair and scalp aging**

Figure 60: Ingredients sought in haircare products, by hair texture – Brazil, January 2020

Figure 61: Anti-aging haircare products

CONSUMER BEHAVIOR OVER CHEMICAL PROCEDURES

- **Products that maintain the vitality of colored hair can attract women aged 55+**

Figure 62: Consumer behavior over chemical procedures, by age group and gender – Brazil, January 2020

Figure 63: Permanent hair colorants with anti-damage active ingredients

- **Brands can invest in technologies that keep the curls hydrated during lightening procedures**

Figure 64: Consumer behavior over chemical procedures, by hair texture – Brazil, January 2020

Figure 65: Amend launches Luxe Creations Blond Care, Brazil, March 2020

CONSUMER ATTITUDES

- **Women are more insecure about their natural hair than men**

Figure 66: Consumer attitudes, by gender – Brazil, January 2020

Figure 67: Salon Line launches motivational content

- **Consumers with straightened hair have an interest in products that improve the health of the scalp**

Figure 68: Consumer attitudes, by consumer behavior over chemical procedures – Brazil, January 2020

Figure 69: Products for oily scalp with dandruff

APPENDIX – ABBREVIATIONS

- **Abbreviations**

APPENDIX – MARKET SIZE AND MARKET SHARE

- **Market size**

Figure 70: Retail sales of shampoo and conditioners, by value – Brazil, 2014-19

Figure 71: Retail sales of hair coloring products, by value – Brazil, 2014-19

- **Market share**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Haircare: Incl Impact of COVID-19 - Brazil - April 2020



Report Price: £3265 | \$4495 | €3940

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 72: Leading companies' retail sales share of shampoos and conditioners, by value – Brazil, 2017-18

Figure 73: Leading companies' retail sales share of hair coloring products, by value – Brazil, 2017-18

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.