

Beauty and Personal Care in Chile

May 2025

Table of Contents

Beauty and Personal Care in Chile

EXECUTIVE SUMMARY

Beauty and personal care in 2024: The big picture 2024 key trends Competitive landscape Retail developments What next for beauty and personal care?

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2019-2024
Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2019-2024
Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2020-2024
Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2020-2024
Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2021-2024
Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2019-2024
Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2019-2024
Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2024
Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2024-2029
Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Baby and child-specific products remains one of the least dynamic categories Beiersdorf's success supported by its leveraging of skin health trend Preference for natural baby products supports pharmacies

PROSPECTS AND OPPORTUNITIES

Baby and child-specific sun care set for strong growth, driven by increase in healthcare recommendations Demand for private label likely to remain elevated despite improving economy Personalised baby care: The future of product innovation

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2019-2024
Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2019-2024
Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2019-2024
Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2020-2024
Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2021-2024
Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2021-2024
Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2021-2024
Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2021-2024
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2024-2029
Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2024-2029
Table 21 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2024-2029

Bath and Shower in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Convenience and discounts drive sales of bath and shower Unilever maintains dominant leadership, while Nivea gains momentum Supermarkets records strong growth with focus on promotions and bulk purchases

PROSPECTS AND OPPORTUNITIES

Affordability set to drive demand for bath and shower over the forecast period Convenience and skin benefits fuel the return of hand sanitisers Skinification trend to expand reach of mass bath and shower

CATEGORY DATA

 Table 22 - Sales of Bath and Shower by Category: Value 2019-2024

Table 23 - Sales of Bath and Shower by Category: % Value Growth 2019-2024

Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2019-2024

Table 25 - NBO Company Shares of Bath and Shower: % Value 2020-2024

Table 26 - LBN Brand Shares of Bath and Shower: % Value 2021-2024

Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2021-2024

Table 28 - Forecast Sales of Bath and Shower by Category: Value 2024-2029

 Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2024-2029

Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2024-2029

Colour Cosmetics in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price increases drive value growth of colour cosmetics in 2024 L'Oréal's enduring leadership of colour cosmetics Beauty specialists helps drive growth of colour cosmetics

PROSPECTS AND OPPORTUNITIES

Low-cost imports set to intensify competition over the forecast period Temporary collections redefine product lifecycles New consumer habits drive innovation in colour cosmetics

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2019-2024Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2019-2024Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2020-2024Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2021-2024Table 35 - LBN Brand Shares of Eye Make-up: % Value 2021-2024Table 36 - LBN Brand Shares of Facial Make-up: % Value 2021-2024Table 37 - LBN Brand Shares of Lip Products: % Value 2021-2024Table 38 - LBN Brand Shares of Nail Products: % Value 2021-2024Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2021-2024Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2024-2029Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2024-2029

Deodorants in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Promotions and dermocosmetics fuel modest growth of deodorants Unilever strengthens its leadership with wide portfolio Chilean consumers turn to pharmacies for deodorants with clinical backing

PROSPECTS AND OPPORTUNITIES

Health and wellness trend to boost deodorant usage Deodorant brands leverage bulk packaging to cultivate consumer habits Growing demand for dermatological deodorants

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2019-2024Table 43 - Sales of Deodorants by Category: % Value Growth 2019-2024Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2019-2024Table 45 - NBO Company Shares of Deodorants: % Value 2020-2024Table 46 - LBN Brand Shares of Deodorants: % Value 2021-2024Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2021-2024Table 48 - Forecast Sales of Deodorants by Category: Value 2024-2029Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2024-2029Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2024-2029

Depilatories in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

New brands and innovations boost sales of women's razors and blades Procter & Gamble strengthens leadership through Gillette brand Pharmacies remains leading distribution channel for depilatories

PROSPECTS AND OPPORTUNITIES

Price-sensitivity to drive higher volume growth of depilatories The future of hair removal in Chile Private label and new brands set to shape competitive landscape

CATEGORY DATA

Table 51 - Sales of Depilatories by Category: Value 2019-2024
Table 52 - Sales of Depilatories by Category: % Value Growth 2019-2024
Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2020-2024
Table 54 - NBO Company Shares of Depilatories: % Value 2020-2024
Table 55 - LBN Brand Shares of Depilatories: % Value 2021-2024
Table 56 - Forecast Sales of Depilatories by Category: Value 2024-2029
Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2024-2029

Fragrances in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Chilean fragrances sustains strong value growth, driven by premium segment Distribuidora Puig Chile retains leadership with wide brand portfolio Direct selling remains leading distribution channel in 2024

PROSPECTS AND OPPORTUNITIES

Premium women's fragrances to record dynamic value growth Larger fragrance formats gain popularity amid promotions and seasonal discounts Chilean consumers turn to Cyber Day events for discounts on premium fragrances

CATEGORY DATA

- Table 58 Sales of Fragrances by Category: Value 2019-2024 Table 59 - Sales of Fragrances by Category: % Value Growth 2019-2024 Table 60 - NBO Company Shares of Fragrances: % Value 2020-2024 Table 61 - LBN Brand Shares of Fragrances: % Value 2021-2024 Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2021-2024 Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2021-2024 Table 64 - Forecast Sales of Fragrances by Category: Value 2024-2029 Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2024-2029

Hair Care in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Conditioners and treatments drives innovation and premiumisation in hair care Elvive's accessible premiumisation drives major growth Pharmacies leverages specialised hair care trend

PROSPECTS AND OPPORTUNITIES

Skinification to fuel hair care growth: Innovation and demand surge expected Utilising influencers and social media as key marketing strategy Consumer awareness to boost demand for heat protectants and detox hair care

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2019-2024
Table 67 - Sales of Hair Care by Category: % Value Growth 2019-2024
Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2019-2024
Table 69 - NBO Company Shares of Hair Care: % Value 2020-2024
Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2020-2024
Table 71 - LBN Brand Shares of Hair Care: % Value 2021-2024
Table 72 - LBN Brand Shares of Colourants: % Value 2021-2024
Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2021-2024
Table 74 - LBN Brand Shares of Styling Agents: % Value 2021-2024
Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2021-2024
Table 76 - Forecast Sales of Hair Care by Category: Value 2024-2029
Table 77 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2024-2029

Men's Grooming in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Despite marginal fall in demand, men's grooming records healthy value growth Unilever retains lead, while Beiersdorf makes significant gains Specialisation drives men's grooming sales via pharmacies

PROSPECTS AND OPPORTUNITIES

Men's grooming set to record stronger growth over the forecast period A shift away from shaving towards more specialised products Social media to help drive future e-commerce growth

CATEGORY DATA

Table 79 - Sales of Men's Grooming by Category: Value 2019-2024 Table 80 - Sales of Men's Grooming by Category: % Value Growth 2019-2024 Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2021-2024 Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2021-2024 Table 83 - NBO Company Shares of Men's Grooming: % Value 2020-2024 Table 84 - LBN Brand Shares of Men's Grooming: % Value 2021-2024 Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2021-2024 Table 86 - Forecast Sales of Men's Grooming by Category: Value 2024-2029

Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2024-2029

Oral Care in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Rising consumer awareness boosts demand for specialist oral care brands Colgate-Palmolive maintains lead, while Procter & Gamble records strong growth Pharmacies remains the specialist channel for oral care

PROSPECTS AND OPPORTUNITIES

Specialist oral care brands to boost value growth over forecast period Future growth in oral health awareness with Pepsodent's nationwide initiative Power toothbrushes to lead Chile's oral care evolution

CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2019-2024 Table 89 - Sales of Oral Care by Category: % Value Growth 2019-2024 Table 90 - Sales of Toothbrushes by Category: Value 2019-2024 Table 91 - Sales of Toothbrushes by Category: % Value Growth 2019-2024 Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2020-2024 Table 93 - NBO Company Shares of Oral Care: % Value 2020-2024 Table 94 - LBN Brand Shares of Oral Care: % Value 2021-2024 Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2021-2024 Table 96 - LBN Brand Shares of Toothpaste: % Value 2021-2024 Table 97 - Forecast Sales of Oral Care by Category: Value 2024-2029 Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2024-2029 Table 99 - Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029 Table 99 - Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029

Skin Care in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Premiumisation and serums drive growth in skin care L'Oréal strengthens leadership, supported by La Roche-Posay and CeraVe Surge in dermocosmetics online, driven by loyalty programmes and special events

PROSPECTS AND OPPORTUNITIES

Serums to gain momentum as dermo skin care continues to expand Pharmacies and beauty specialists boost expansion of Korean beauty brands The rise of alternative active ingredients in skin care

CATEGORY DATA

Table 101 - Sales of Skin Care by Category: Value 2019-2024Table 102 - Sales of Skin Care by Category: % Value Growth 2019-2024Table 103 - NBO Company Shares of Skin Care: % Value 2020-2024Table 104 - LBN Brand Shares of Skin Care: % Value 2021-2024Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2021-2024Table 106 - LBN Brand Shares of Anti-agers: % Value 2021-2024Table 107 - LBN Brand Shares of Firming Body Care: % Value 2021-2024Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2021-2024Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2021-2024Table 109 - LBN Brand Shares of Skin Care by Category: Value 2021-2024Table 110 - Forecast Sales of Skin Care by Category: % Value Growth 2024-2029

Sun Care in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mass sun protection remains most popular, while premium segment gains ground Trust in dermocosmetics drives success of La Roche-Posay Anthelios Consumers seek best deals in sun care, driving up sales via e-commerce

PROSPECTS AND OPPORTUNITIES

The rise of year-round sun protection in Chile Chile's outdoor culture fuels sun care demand Cross-category blurring as consumers shield skin from environmental damage

CATEGORY DATA

Table 112 - Sales of Sun Care by Category: Value 2019-2024Table 113 - Sales of Sun Care by Category: % Value Growth 2019-2024Table 114 - NBO Company Shares of Sun Care: % Value 2020-2024Table 115 - LBN Brand Shares of Sun Care: % Value 2021-2024Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2021-2024Table 117 - Forecast Sales of Sun Care by Category: Value 2024-2029Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2024-2029

Premium Beauty and Personal Care in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Premium beauty sales soar as economic recovery sparks consumer confidence L'Oréal's dermatological edge supports its overall lead Premium beauty is gaining ground in Chile

PROSPECTS AND OPPORTUNITIES

Premium skin care, adult sun care and fragrances to lead growth Conditioners and treatments to drive sales of premium hair care Premium skin care brands likely to explore new ingredients

CATEGORY DATA

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2019-2024Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2019-2024Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2020-2024

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2021-2024Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2024-2029Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2024-2029

Mass Beauty and Personal Care in Chile

KEY DATA FINDINGS

2024 DEVELOPMENTS

Premiumisation fuels value growth in mass beauty and personal care Unilever retains lead, while Beiersdorf makes gains Mass beauty's evolution: How Generation Z is influencing trends

PROSPECTS AND OPPORTUNITIES

Consumers set to balance premium and mass segments for quality and value The diversification of dermo-positioned products Skinification trend to drive innovation

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2019-2024Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2019-2024Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2020-2024Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2021-2024Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2024-2029Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Crowth 2024-2029

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-chile/report.