



# Passport

## Oral Care in Mexico

Euromonitor International

July 2024

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Some content and data have been  
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# ORAL CARE IN MEXICO - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2023 DEVELOPMENTS

Consumers are demanding more sustainable oral care products

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Whitening solutions are drawing attention from consumers

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Ingredient-based trends increasingly benefit oral care

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## PROSPECTS AND OPPORTUNITIES

A concerning oral health scenario presents a good opportunity for growth through education and accessibility

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Gums can also benefit from the “skinification” trend

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Growing interest in power toothbrushes highlights the premiumisation of oral care

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### CATEGORY DATA

Table 1 Sales of Oral Care by Category: Value 2018-2023

MXN million	2018	2019	2020	2021	2022	2023
Oral Care	Data removed from sample					
Dental Floss						
Denture Care						
- Denture Cleansers						
- Denture Fixatives						
Mouth Fresheners						
Mouthwashes/Dental Rinses						
Tooth Whiteners						
Toothbrushes						
- Manual Toothbrushes						
- Power Toothbrushes						
Toothpaste						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 2 Sales of Oral Care by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Oral Care	Data removed from sample		
Dental Floss			
Denture Care			
- Denture Cleansers			
- Denture Fixatives			
Mouth Fresheners			
Mouthwashes/Dental Rinses			
Tooth Whiteners			
Toothbrushes			
- Manual Toothbrushes			
- Power Toothbrushes			
Toothpaste			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 3 Sales of Toothbrushes by Category: Value 2018-2023

MXN million	2018	2019	2020	2021	2022	2023
Toothbrushes	Data removed from sample					

- Manual Toothbrushes
- Power Toothbrushes
- Battery Toothbrushes
- Battery Toothbrush Replacement Heads
- Battery Toothbrush Units
- Electric Toothbrushes
- Electric Toothbrush Replacement Heads
- Electric Toothbrush Units

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Toothbrushes by Category: % Value Growth 2018-2023**

% current value growth

2022/23      2018-23 CAGR      2018/23 Total

- Toothbrushes
- Manual Toothbrushes
- Power Toothbrushes
- Battery Toothbrushes
- Battery Toothbrush Replacement Heads
- Battery Toothbrush Units
- Electric Toothbrushes
- Electric Toothbrush Replacement Heads
- Electric Toothbrush Units

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 Sales of Toothpaste by Type: % Value Breakdown 2019-2023**

% retail value rsp

2019      2020      2021      2022      2023

- Traditional/Standard/Basic
- Total Care/Complete Care
- Whitening
- Fresh Breath
- Children's
- Sensitive
- Others
- Total

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 NBO Company Shares of Oral Care: % Value 2019-2023**

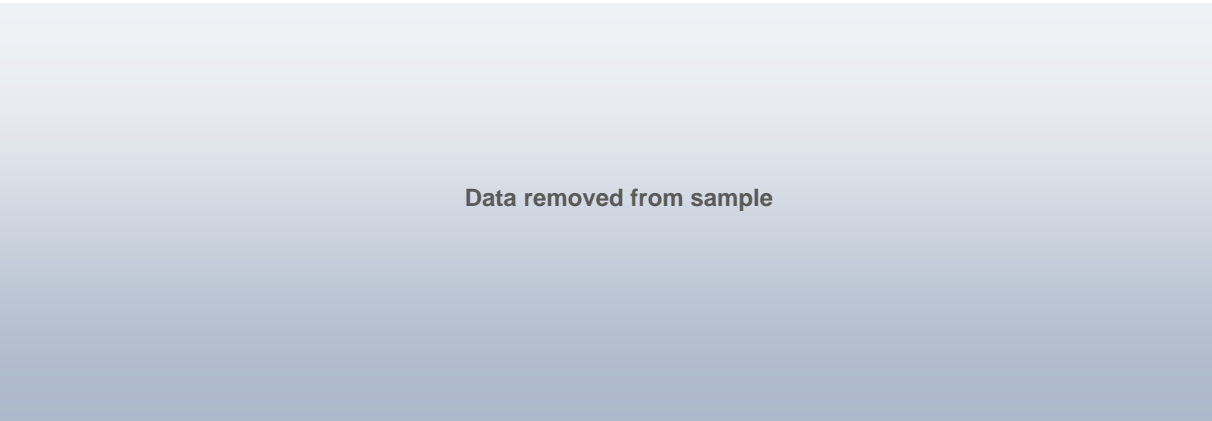
% retail value rsp

Company

2019      2020      2021      2022      2023

Data removed from sample





Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Oral Care: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8 LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2020-2023**

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 9 LBN Brand Shares of Toothpaste: % Value 2020-2023**

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 10 Forecast Sales of Oral Care by Category: Value 2023-2028**

MXN million

	2023	2024	2025	2026	2027	2028
Oral Care Dental Floss Denture Care - Denture Cleansers - Denture Fixatives Mouth Fresheners Mouthwashes/Dental Rinses Tooth Whiteners Toothbrushes - Manual Toothbrushes - Power Toothbrushes Toothpaste	Data removed from sample					
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					
Note:	Oral Care total excludes the category total for manual and power toothbrushes					

**Table 11 Forecast Sales of Oral Care by Category: % Value Growth 2023-2028**

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Oral Care Dental Floss Denture Care - Denture Cleansers - Denture Fixatives Mouth Fresheners Mouthwashes/Dental Rinses Tooth Whiteners Toothbrushes - Manual Toothbrushes - Power Toothbrushes Toothpaste	Data removed from sample		
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		
Note:	Oral Care total excludes the category total for manual and power toothbrushes		

**Table 12 Forecast Sales of Toothbrushes by Category: Value 2023-2028**

MXN million	2023	2024	2025	2026	2027	2028
Toothbrushes - Manual Toothbrushes - Power Toothbrushes -- Battery Toothbrushes --- Battery Toothbrush Replacement Heads --- Battery Toothbrush Units -- Electric Toothbrushes --- Electric Toothbrush Replacement Heads --- Electric Toothbrush Units	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 13 Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Toothbrushes	Data removed from sample		
- Manual Toothbrushes			
- Power Toothbrushes			
-- Battery Toothbrushes			
--- Battery Toothbrush Replacement Heads			
--- Battery Toothbrush Units			
-- Electric Toothbrushes			
--- Electric Toothbrush Replacement Heads			
--- Electric Toothbrush Units			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# BEAUTY AND PERSONAL CARE IN MEXICO - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

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### 2023 key trends

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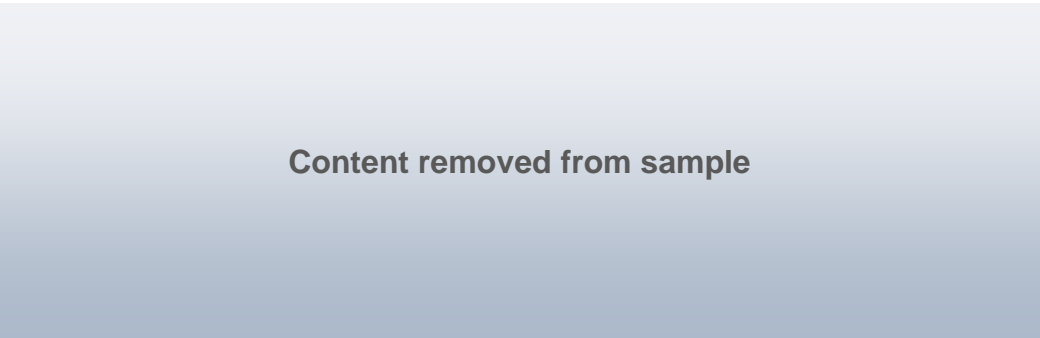
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### Competitive landscape

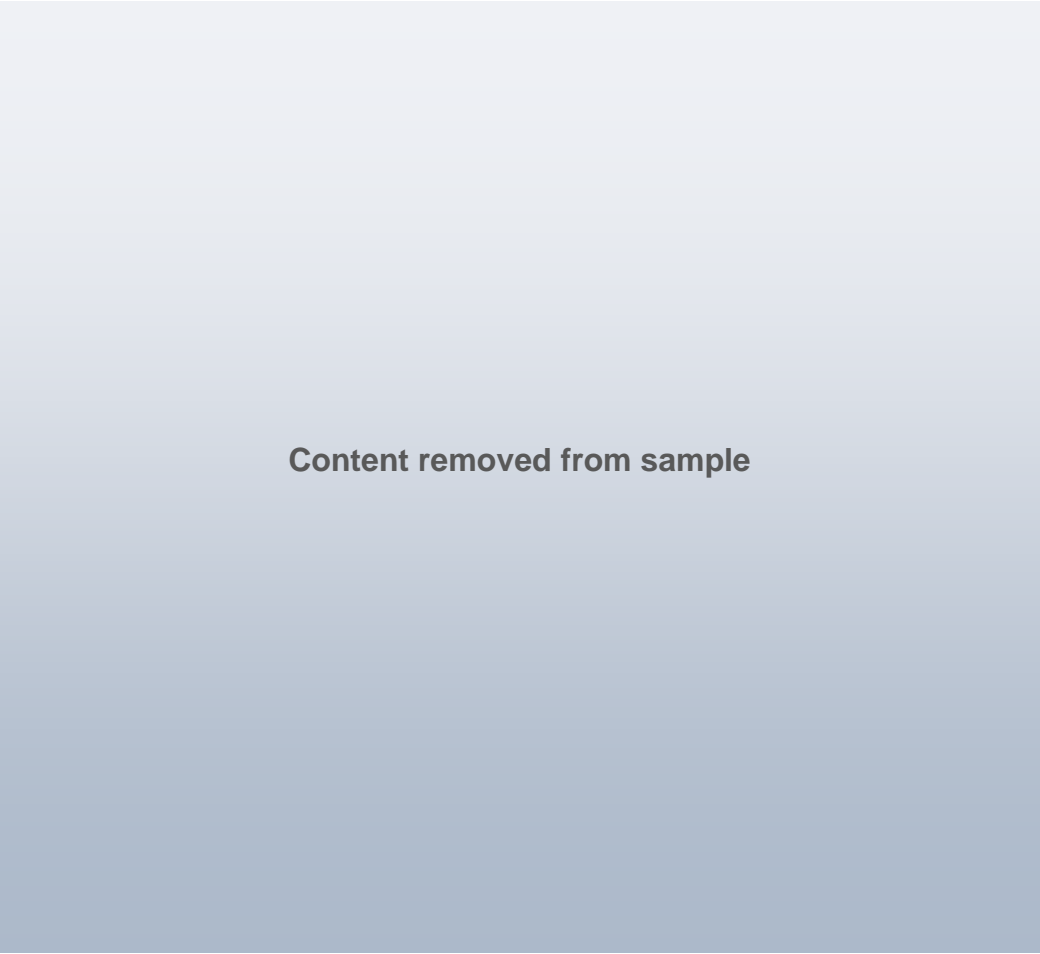
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### Retailing developments

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What next for beauty and personal care?



MARKET DATA

Table 14 Sales of Beauty and Personal Care by Category: Value 2018-2023

MXN million	2018	2019	2020	2021	2022	2023
Beauty and Personal Care Baby and Child-specific	Data removed from sample					



Products  
 Bath and Shower  
 Colour Cosmetics  
 Deodorants  
 Depilatories  
 Fragrances  
 Hair Care  
 Men's Grooming  
 Oral Care  
 Oral Care Excl Power  
 Toothbrushes  
 Skin Care  
 Sun Care  
 Premium Beauty and  
 Personal Care  
 Prestige Beauty and  
 Personal Care  
 Mass Beauty and  
 Personal Care  
 Dermocosmetics Beauty  
 and Personal Care

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

**Table 15 Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023**

% current value growth

2022/23      2018-23 CAGR      2018/23 Total

Beauty and Personal Care  
 Baby and Child-specific Products  
 Bath and Shower  
 Colour Cosmetics  
 Deodorants  
 Depilatories  
 Fragrances  
 Hair Care  
 Men's Grooming  
 Oral Care  
 Oral Care Excl Power Toothbrushes  
 Skin Care  
 Sun Care  
 Premium Beauty and Personal Care  
 Prestige Beauty and Personal Care  
 Mass Beauty and Personal Care  
 Dermocosmetics Beauty and Personal Care

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

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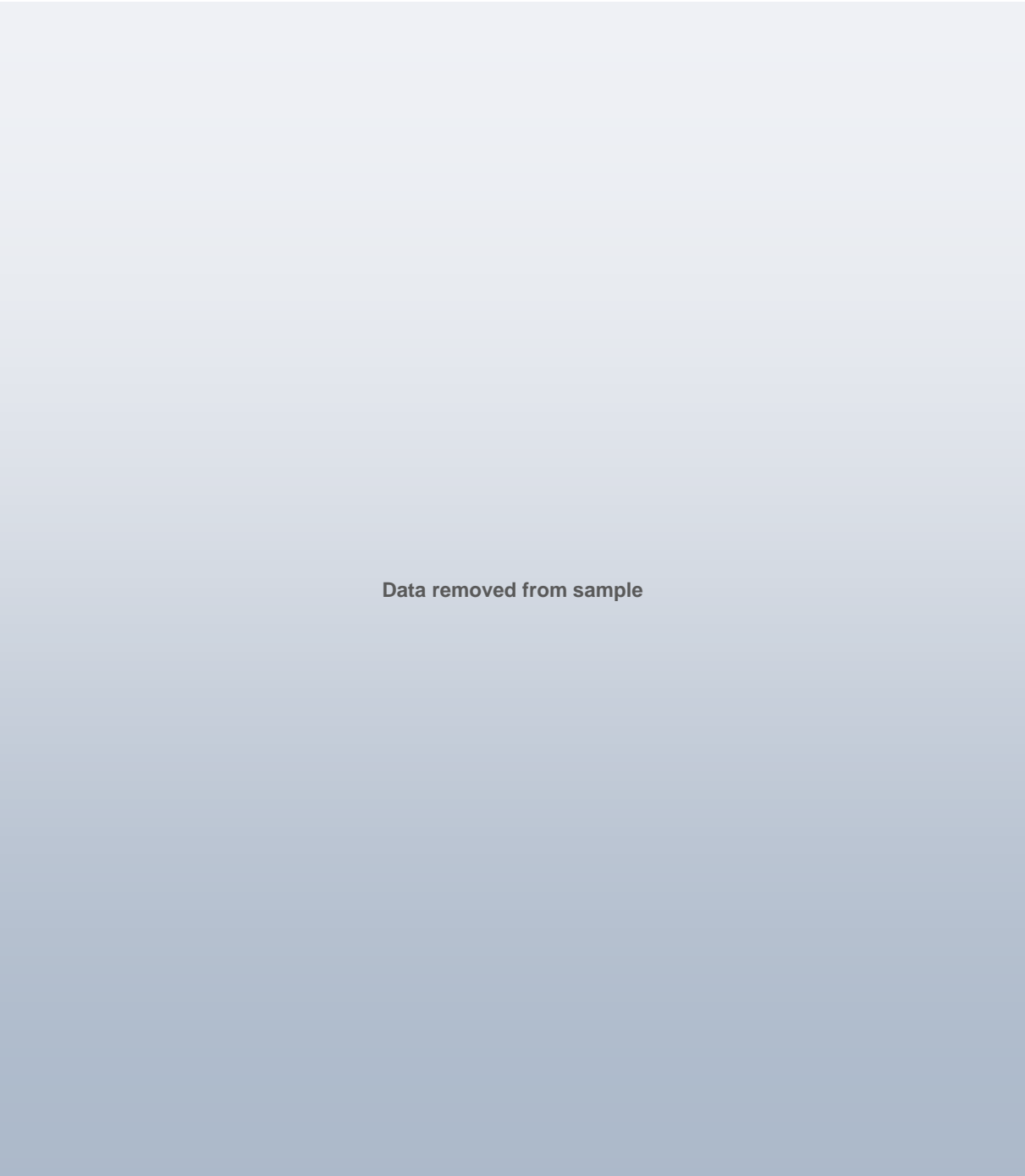
Table 16 GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

% retail value rsp Company	2019	2020	2021	2022	2023
Data removed from sample					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 19 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023**

% retail value rsp	2018	2019	2020	2021	2022	2023
Beauty and Personal Care	<b>Data removed from sample</b>					
Baby and Child-specific Products						
Bath and Shower						
Colour Cosmetics						
Depilatories						
Hair Care						
Men's Grooming						
Oral Care						
Skin Care						
Premium Beauty and Personal Care						
Prestige Beauty and Personal Care						
Mass Beauty and Personal Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 20 Distribution of Beauty and Personal Care by Format: % Value 2018-2023**

% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels	<b>Data removed from sample</b>					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
---- Department Stores						
---- Variety Stores						

--- Apparel and Footwear Specialists  
 --- Appliances and Electronics Specialists  
 --- Home Products Specialists  
 --- Health and Beauty Specialists  
 ---- Beauty Specialists  
 ---- Pharmacies  
 ---- Optical Goods Stores  
 ---- Health and Personal Care Stores  
 --- Leisure and Personal Goods Specialists  
 --- Other Non-Grocery Retailers  
 -- Vending  
 -- Direct Selling  
 - Retail E-Commerce  
 Non-retail channels  
 - Hair Salons  
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 21** Distribution of Beauty and Personal Care by Format and Category: % Value 2023

% retail value rsp

Baby and Child-specific Products    Bath and Shower    Colour Cosmetics    Deodorants    Depilatories    Fragrances

Retail Channels  
 - Retail Offline  
 -- Grocery Retailers  
 --- Convenience Retail  
 ---- Convenience Stores  
 ---- Forecourt Retailers  
 --- Supermarkets  
 --- Hypermarkets  
 --- Discounters  
 --- Warehouse Clubs  
 --- Food/drink/tobacco specialists  
 --- Small Local Grocers  
 -- Non-Grocery Retailers  
 --- General Merchandise Stores  
 ---- Department Stores  
 ---- Variety Stores  
 --- Apparel and Footwear Specialists  
 --- Appliances and Electronics Specialists  
 --- Home Products

Data removed from sample

Specialists  
 --- Health and Beauty Specialists  
 ---- Beauty Specialists  
 ---- Pharmacies  
 ---- Optical Goods Stores  
 ---- Health and Personal Care Stores  
 --- Leisure and Personal Goods Specialists  
 --- Other Non-Grocery Retailers  
 -- Vending  
 -- Direct Selling  
 - Retail E-Commerce  
 Non-retail channels  
 - Hair Salons  
 Total

Data removed from sample

Hair Care      Men's Grooming      Oral Care      Skin Care      Sun Care

Retail Channels  
 - Retail Offline  
 -- Grocery Retailers  
 --- Convenience Retail  
 ---- Convenience Stores  
 ---- Forecourt Retailers  
 --- Supermarkets  
 --- Hypermarkets  
 --- Discounters  
 --- Warehouse Clubs  
 --- Food/drink/tobacco specialists  
 --- Small Local Grocers  
 -- Non-Grocery Retailers  
 --- General Merchandise Stores  
 ---- Department Stores  
 ---- Variety Stores  
 --- Apparel and Footwear Specialists  
 --- Appliances and Electronics Specialists  
 --- Home Products Specialists  
 --- Health and Beauty Specialists  
 ---- Beauty Specialists  
 ---- Pharmacies  
 ---- Optical Goods Stores  
 ---- Health and Personal Care Stores  
 --- Leisure and Personal Goods Specialists  
 --- Other Non-Grocery Retailers  
 -- Vending  
 -- Direct Selling

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- Retail E-Commerce  
Non-retail channels  
- Hair Salons  
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SK = skin care; SU = sun care

**Table 22 Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028**

MXN million

2023 2024 2025 2026 2027 2028

Beauty and Personal Care  
Baby and Child-specific  
Products  
Bath and Shower  
Colour Cosmetics  
Deodorants  
Depilatories  
Fragrances  
Hair Care  
Men's Grooming  
Oral Care  
Oral Care Excl Power  
Toothbrushes  
Skin Care  
Sun Care  
Premium Beauty and  
Personal Care  
Prestige Beauty and  
Personal Care  
Mass Beauty and  
Personal Care  
Dermocosmetics Beauty  
and Personal Care

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

**Table 23 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028**

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

Beauty and Personal Care  
Baby and Child-specific Products  
Bath and Shower  
Colour Cosmetics  
Deodorants  
Depilatories

Data removed from sample



Fragrances  
 Hair Care  
 Men's Grooming  
 Oral Care  
 Oral Care Excl Power Toothbrushes  
 Skin Care  
 Sun Care  
 Premium Beauty and Personal Care  
 Prestige Beauty and Personal Care  
 Mass Beauty and Personal Care  
 Dermocosmetics Beauty and Personal Care

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

## DISCLAIMER

Forecast and scenario closing date: 8 April 2024

Report closing date: 11 July 2024

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on [www.euromonitor.com](http://www.euromonitor.com) and via the Passport system, where new content is being added on a systematic basis.

## SOURCES

Sources used during the research included the following:

### Summary 1 Research Sources

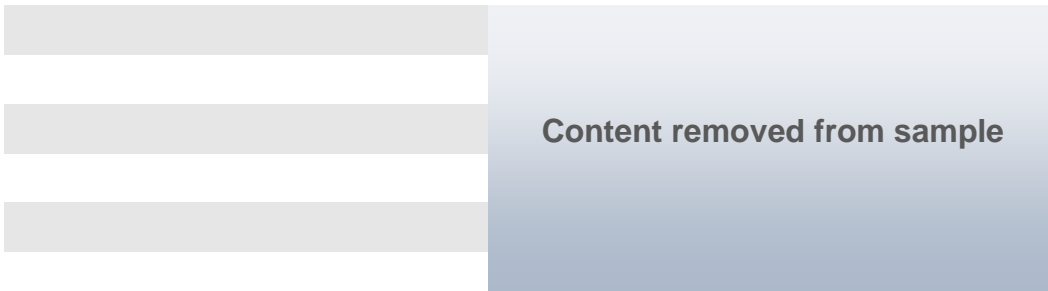
Official Sources

Trade Associations

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Trade Press

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Source: Euromonitor International