



Passport

NRT Smoking Cessation Aids in Brazil

Euromonitor International

March 2024

This sample report is for illustration
purposes only.

Some content and data have been
changed.

To purchase a full version, please visit
www.euromonitor.com

LIST OF CONTENTS AND TABLES

| | |
|------------------------------------------------------------------------------------------------------------|----|
| NRT Smoking Cessation Aids in Brazil - Category Analysis..... | 1 |
| KEY DATA FINDINGS..... | 1 |
| 2023 DEVELOPMENTS..... | 1 |
| Nrt smoking cessation aids sees a weak performance as high prices continue to discourage consumption | 1 |
| Niquitin and nicorette dominate despite a lack of innovation | 1 |
| Gradual reduction in consumption is the main strategy adopted by brazilians who want to quit smoking | 2 |
| PROSPECTS AND OPPORTUNITIES..... | 2 |
| E-cigarettes will continue to offer competition to nrt smoking cessation aids..... | 2 |
| Tax reform could add another layer of disincentive to tobacco consumption..... | 3 |
| Nrt smoking cessation aids in brazil: Navigating maturity and limited innovation | 3 |
| CATEGORY INDICATORS | 3 |
| Table 1 Number of Smokers by Gender 2018-2023..... | 3 |
| CATEGORY DATA..... | 4 |
| Table 2 Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023..... | 4 |
| Table 3 Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023 | 4 |
| Table 4 NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023..... | 4 |
| Table 5 LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023 | 5 |
| Table 6 Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028 | 5 |
| Table 7 Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028 | 5 |
| Consumer Health in Brazil - Industry Overview | 7 |
| EXECUTIVE SUMMARY | 7 |
| Consumer health in 2023: The big picture | 7 |
| 2023 key trends | 8 |
| Competitive landscape | 8 |
| Retailing developments | 9 |
| What next for consumer health? | 11 |
| MARKET INDICATORS | 11 |
| Table 8 Consumer Expenditure on Health Goods and Medical Services: Value 2018-2023 | 11 |
| Table 9 Life Expectancy at Birth 2018-2023 | 12 |
| MARKET DATA..... | 12 |
| Table 10 Sales of Consumer Health by Category: Value 2018-2023 | 12 |
| Table 11 Sales of Consumer Health by Category: % Value Growth 2018-2023 | 12 |
| Table 12 NBO Company Shares of Consumer Health: % Value 2019-2023..... | 13 |
| Table 13 LBN Brand Shares of Consumer Health: % Value 2020-2023 | 14 |
| Table 14 Penetration of Private Label in Consumer Health by Category: % Value 2018-2023..... | 15 |
| Table 15 Distribution of Consumer Health by Format: % Value 2018-2023 | 16 |

| | | |
|------------------------------------------------------------------------|----------------------------------------------------------------------------------|----|
| Table 16 | Distribution of Consumer Health by Format and Category: % Value 2023 | 16 |
| Table 17 | Forecast Sales of Consumer Health by Category: Value 2023-2028 | 18 |
| Table 18 | Forecast Sales of Consumer Health by Category: % Value Growth 2023-2028 | 18 |
| APPENDIX | | 19 |
| Otc registration and classification | | 19 |
| Vitamins and dietary supplements registration and classification | | 21 |
| Self-medication/self-care and preventive medicine..... | | 21 |
| Switches | | 22 |
| DISCLAIMER | | 22 |
| DEFINITIONS..... | | 22 |
| SOURCES..... | | 23 |
| Summary 1 | Research Sources..... | 23 |

NRT SMOKING CESSATION AIDS IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2023 DEVELOPMENTS

Nrt smoking cessation aids sees a weak performance as high prices continue to discourage consumption

Content removed from sample

Niquitin and nicorette dominate despite a lack of innovation

Content removed from sample

Content removed from sample

Gradual reduction in consumption is the main strategy adopted by brazilians who want to quit smoking

Content removed from sample

PROSPECTS AND OPPORTUNITIES

E-cigarettes will continue to offer competition to nrt smoking cessation aids

Content removed from sample

Content removed from sample

Tax reform could add another layer of disincentive to tobacco consumption

Content removed from sample

Nrt smoking cessation aids in brazil: Navigating maturity and limited innovation

Content removed from sample

CATEGORY INDICATORS

Table 1 Number of Smokers by Gender 2018-2023

| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---------------|--------------------------|------|------|------|------|------|
| Male ('000) | Data removed from sample | | | | | |
| Male (%) | | | | | | |
| Female ('000) | | | | | | |
| Female (%) | | | | | | |
| Total ('000) | | | | | | |
| Total (%) | | | | | | |

Source: Euromonitor International from official statistics

CATEGORY DATA

Table 2 Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023

| BRL million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------------|--------------------------|------|------|------|------|------|
| NRT Smoking Cessation Aids | Data removed from sample | | | | | |
| - NRT Gum | | | | | | |
| - NRT Inhalators | | | | | | |
| - NRT Lozenges | | | | | | |
| - NRT Patches | | | | | | |
| - Other NRT | | | | | | |

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

Note: 2023 data is provisional and based on part-year estimates

Table 3 Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|----------------------------|--------------------------|--------------|---------------|
| NRT Smoking Cessation Aids | Data removed from sample | | |
| - NRT Gum | | | |
| - NRT Inhalators | | | |
| - NRT Lozenges | | | |
| - NRT Patches | | | |
| - Other NRT | | | |

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

Note: 2023 data is provisional and based on part-year estimates

Table 4 NBO Company Shares of NRT Smoking Cessation Aids: % 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 5 LBN Brand Shares of NRT Smoking Cessation Aids: % 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 6 Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028

| BRL million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|-------------|------|------|------|------|------|------|
|-------------|------|------|------|------|------|------|

NRT Smoking Cessation
Aids

- NRT Gum
- NRT Inhalators
- NRT Lozenges
- NRT Patches
- Other NRT

Data removed from sample

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

Note: 2023 data is provisional and based on part-year estimates

Table 7 Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|-------------------------|-----------|--------------|---------------|
|-------------------------|-----------|--------------|---------------|

NRT Smoking Cessation Aids

- NRT Gum
- NRT Inhalators
- NRT Lozenges
- NRT Patches
- Other NRT

Data removed from sample

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

Note: 2023 data is provisional and based on part-year estimates

CONSUMER HEALTH IN BRAZIL - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer health in 2023: The big picture

Content removed from sample

2023 key trends

Content removed from sample

Competitive landscape

Content removed from sample

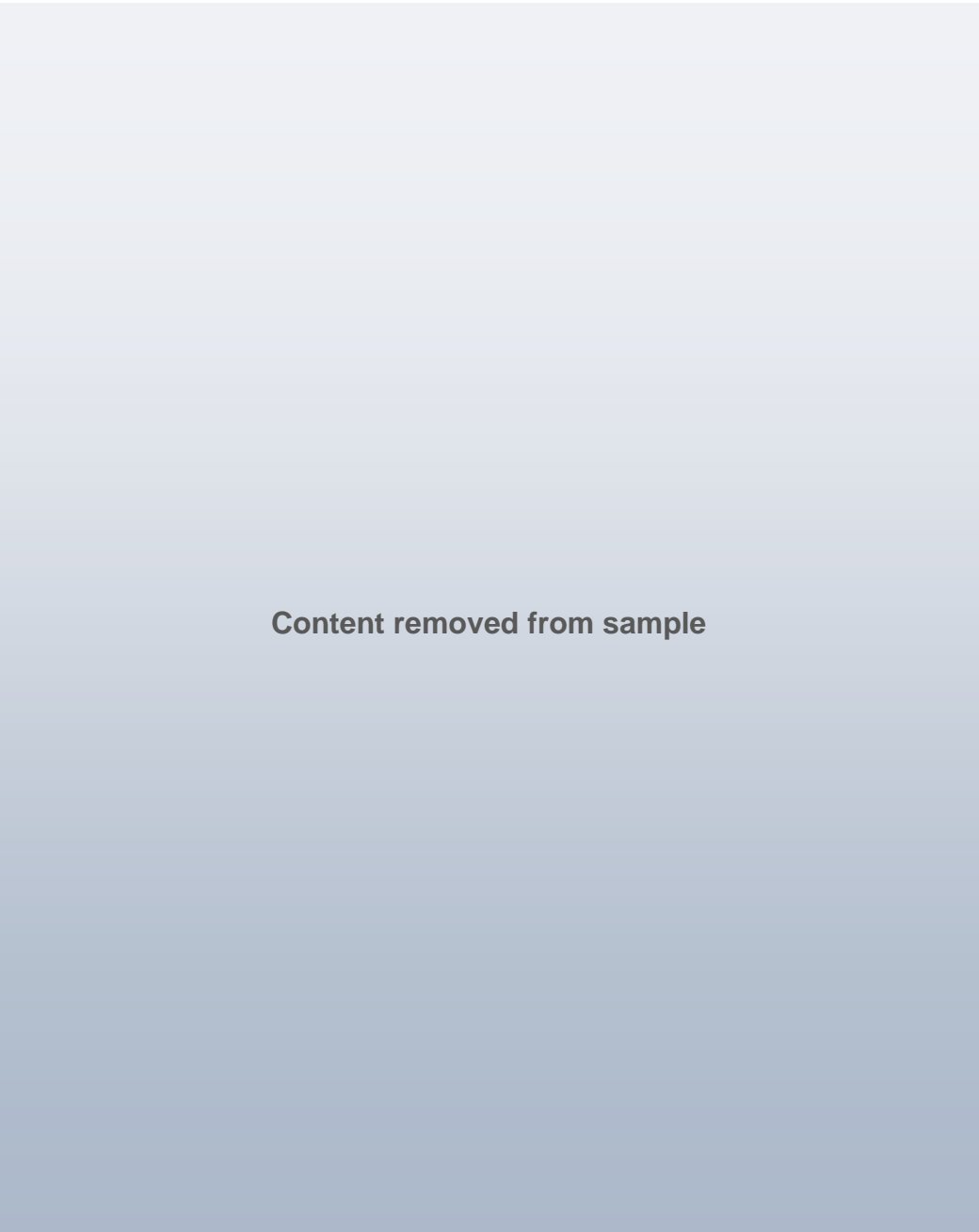
Content removed from sample

Retailing developments

Content removed from sample

Content removed from sample

What next for consumer health?



MARKET INDICATORS

Table 8 Consumer Expenditure on Health Goods and Medical Services: Value 2018-2023

| | | | | | | |
|------------------|--------------------------|------|------|------|------|------|
| BRL million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
| Pharmaceuticals, | Data removed from sample | | | | | |

medical appliances/
equipment
Outpatient services
Hospital services
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade interviews

Table 9 Life Expectancy at Birth 2018-2023

| years | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---------|--------------------------|------|------|------|------|------|
| Males | Data removed from sample | | | | | |
| Females | | | | | | |

Source: Euromonitor International from official statistics

MARKET DATA

Table 10 Sales of Consumer Health by Category: Value 2018-2023

| BRL million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|-----------------------|--------------------------|------|------|------|------|------|
| Consumer Health | Data removed from sample | | | | | |
| OTC | | | | | | |
| Sports Nutrition | | | | | | |
| Vitamins and Dietary | | | | | | |
| Supplements | | | | | | |
| Weight Management and | | | | | | |
| Wellbeing | | | | | | |
| Herbal/Traditional | | | | | | |
| Products | | | | | | |
| Allergy Care | | | | | | |
| Paediatric Consumer | | | | | | |
| Health | | | | | | |

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

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing

Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements

Note 3: 2023 data is provisional and based on part-year estimates

Table 11 Sales of Consumer Health by Category: % Value Growth 2018-2023

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|----------------------------------|--------------------------|--------------|---------------|
| Consumer Health | Data removed from sample | | |
| OTC | | | |
| Sports Nutrition | | | |
| Vitamins and Dietary Supplements | | | |

Weight Management and Wellbeing
 Herbal/Traditional Products
 Allergy Care
 Paediatric Consumer Health

Data removed from sample

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

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing

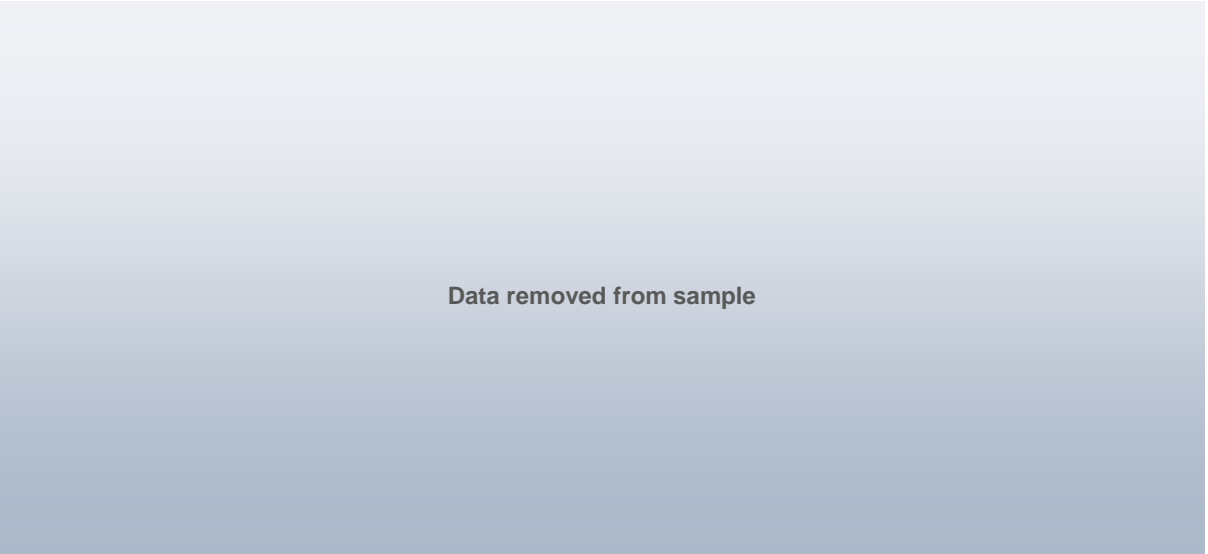
Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements

Note 3: 2023 data is provisional and based on part-year estimates

Table 12 NBO Company Shares of Consumer Health: % Value 2019-2023

| % retail value rsp | 2019 | 2020 | 2021 | 2022 | 2023 |
|--------------------|------|------|------|------|------|
| Company | | | | | |

Data removed from sample



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

Table 13 LBN Brand Shares of Consumer Health: % Value 2020-2023

| % retail value rsp Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-----------------------------------|---------------|------|------|------|------|
| 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 14 Penetration of Private Label in Consumer Health by Category: % Value 2018-2023

| % retail value rsp | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--------------------------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Health Vitamins and Dietary Supplements | Data removed from sample | | | | | |

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

Table 15 Distribution of Consumer Health by Format: % Value 2018-2023

| % retail value rsp | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--------------------------------------------|--------------------------|------|------|------|------|------|
| Retail Channels | Data removed from sample | | | | | |
| - 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 | | | | | | |
| Total | | | | | | |

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

Table 16 Distribution of Consumer Health by Format and Category: % Value 2023

| % retail value rsp | OTC | Sports Nutrition | Vitamins and Management Dietary Supplements | Weight and Wellbeing | Herbal/ Traditional Products | Allergy 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
- Retail E-Commerce
- Total

Data removed from sample

Paediatric
Consumer
Health

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

Data removed from sample

---- 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
 Total

Data removed from sample

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

Key: OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WMW = weight management and wellbeing; HTP = herbal/traditional products; AC = Allergy Care; PCH = paediatric consumer health

Table 17 Forecast Sales of Consumer Health by Category: Value 2023-2028

BRL million

2023 2024 2025 2026 2027 2028

Consumer Health
 OTC
 Sports Nutrition
 Vitamins and Dietary Supplements
 Weight Management and Wellbeing
 Herbal/Traditional Products
 Allergy Care
 Paediatric Consumer Health

Data removed from sample

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

Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing

Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements

Note 3: 2023 data is provisional and based on part-year estimates

Table 18 Forecast Sales of Consumer Health by Category: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

Consumer Health
OTC
Sports Nutrition
Vitamins and Dietary Supplements
Weight Management and Wellbeing
Herbal/Traditional Products
Allergy Care
Paediatric Consumer Health

Data removed from sample

- Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
- Note 1: Consumer health total is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing
- Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements
- Note 3: 2023 data is provisional and based on part-year estimates

APPENDIX

Otc registration and classification

Content removed from sample

Content removed from sample

Content removed from sample

Vitamins and dietary supplements registration and classification

Content removed from sample

Self-medication/self-care and preventive medicine

Content removed from sample

Content removed from sample

Switches

Content removed from sample

DISCLAIMER

Forecast and scenario closing date: 4 September 2023

Report closing date: 18 March 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 and via the Passport system, where new content is being added on a systematic basis.

DEFINITIONS

The total market size given for consumer health is the sum of OTC, sports nutrition, vitamins and dietary supplements and weight management and wellbeing.

The sum of these categories is greater than actual market size because allergy care is a duplicate of categories found in cough, cold and allergy (hay fever) remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and

vitamins and dietary supplements; and herbal/traditional products is an aggregate of herbal/traditional categories in OTC and vitamins and dietary supplements.
2023 data are provisional and based on part-year estimates.

SOURCES

Sources used during the research included the following:

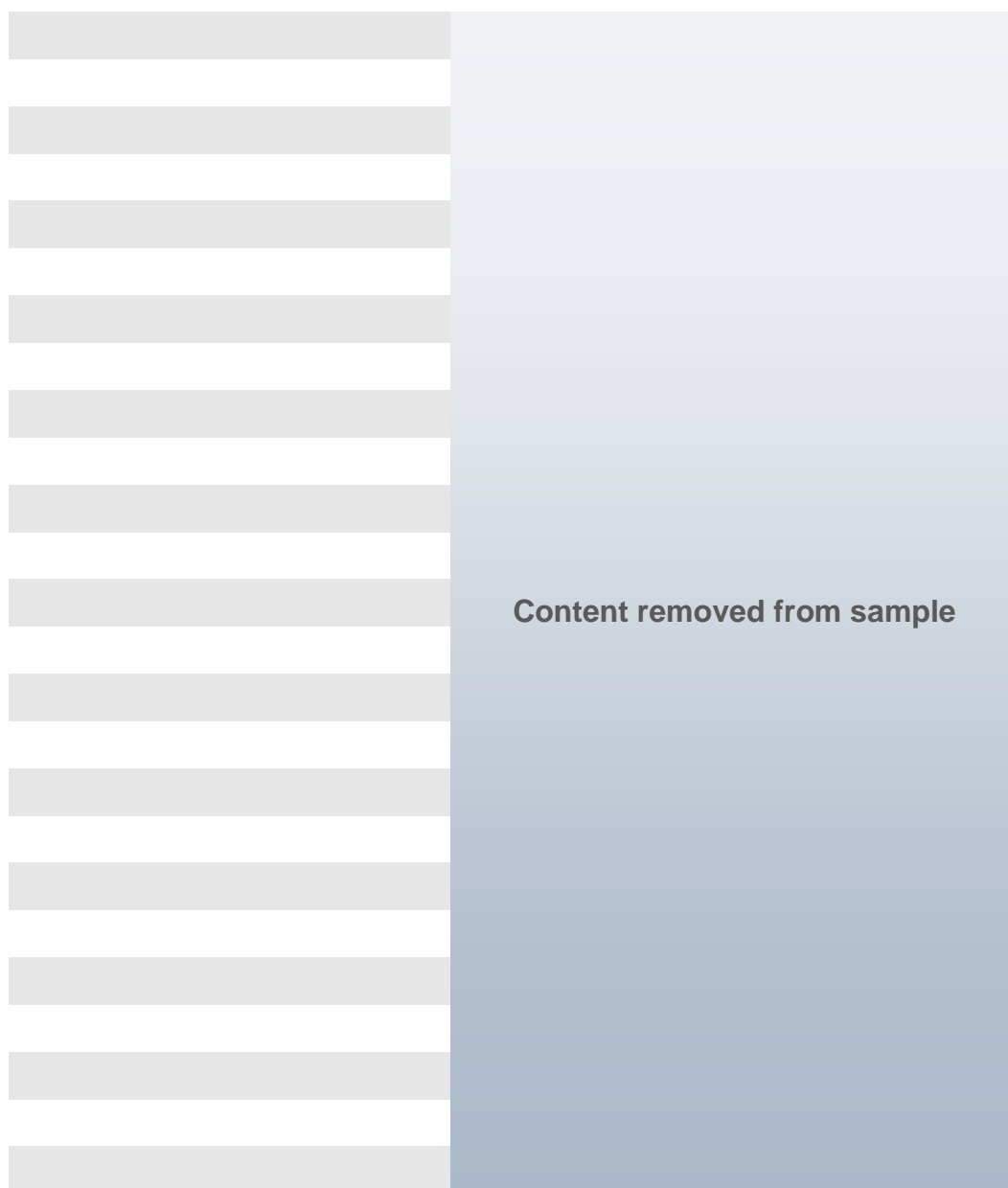
Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

Content removed from sample



Source: Euromonitor International