



Passport

Paediatric Consumer Health in Brazil

Euromonitor International

March 2024

This sample report is for illustration purposes only.

Some content and data have been changed.

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PAEDIATRIC CONSUMER HEALTH IN BRAZIL - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Dengue cases increase, boosting demand for dipyrone

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Anvisa bans melatonin supplements for irregular advertising

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Nappy (diaper) rash treatments accounts for more than half of sales in paediatric consumer health, and brand credibility remains crucial

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PROSPECTS AND OPPORTUNITIES

Paediatric vitamins and dietary supplements the highlight in terms of forecast growth

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Demographic changes put pressure on the category and point to diversification

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Content removed from sample

Women infected with zika during pregnancy have an increased risk of having children with autism spectrum disorder

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CATEGORY DATA

Table 1 Sales of Paediatric Consumer Health by Category: Value 2018-2023

BRL million	2018	2019	2020	2021	2022	2023
Paediatric Consumer Health	Data removed from sample					
Paediatric Analgesics						
- Paediatric Acetaminophen						
- Paediatric Aspirin						
- Paediatric Combination Products - Analgesics						
- Paediatric Dipyron						
- Paediatric Ibuprofen						
- Paediatric Naproxen						
Paediatric Cough, Cold and Allergy Remedies						
- Paediatric Allergy Remedies						
- Paediatric Cough/Cold Remedies						
Paediatric Digestive Remedies						
- Paediatric Diarrhoeal Remedies						
- Paediatric Indigestion and Heartburn Remedies						
- Paediatric Laxatives						
- Paediatric Motion Sickness Remedies						
Paediatric Dermatologicals						
Nappy (Diaper) Rash Treatments						
Paediatric Vitamins and Dietary Supplements						

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 2 Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Paediatric Consumer Health	Data removed from sample		
Paediatric Analgesics			
- Paediatric Acetaminophen			
- Paediatric Aspirin			
- Paediatric Combination Products - Analgesics			
- Paediatric Dipyron			
- Paediatric Ibuprofen			
- Paediatric Naproxen			

Paediatric Cough, Cold and Allergy Remedies

- Paediatric Allergy Remedies

- Paediatric Cough/Cold Remedies

Paediatric Digestive Remedies

- Paediatric Diarrhoeal Remedies

- Paediatric Indigestion and Heartburn Remedies

- Paediatric Laxatives

- Paediatric Motion Sickness Remedies

Paediatric Dermatologicals

Nappy (Diaper) Rash Treatments

Paediatric 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

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

Table 3 NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023

% retail value rsp	2019	2020	2021	2022	2023
Company					

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 4 LBN Brand Shares of Paediatric 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 5 Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

BRL million	2023	2024	2025	2026	2027	2028
Paediatric Consumer Health	Data removed from sample					
Paediatric Analgesics						
- Paediatric Acetaminophen						
- Paediatric Aspirin						
- Paediatric Combination Products - Analgesics						
- Paediatric Dipyrrone						
- Paediatric Ibuprofen						
- Paediatric Naproxen						
Paediatric Cough, Cold and Allergy Remedies						
- Paediatric Allergy Remedies						
- Paediatric Cough/Cold Remedies						
Paediatric Digestive Remedies						
- Paediatric Diarrhoeal Remedies						
- Paediatric Indigestion and Heartburn Remedies						
- Paediatric Laxatives						

- Paediatric Motion
Sickness Remedies
Paediatric
Dermatologicals
Nappy (Diaper) Rash
Treatments
Paediatric Vitamins and
Dietary Supplements

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 6 Forecast Sales of Paediatric Consumer Health by Category: % Value Growth
2023-2028**

% constant value growth

2023/2024

2023-28 CAGR

2023/28 Total

Paediatric Consumer Health
Paediatric Analgesics
- Paediatric Acetaminophen
- Paediatric Aspirin
- Paediatric Combination Products - Analgesics
- Paediatric Dipyrrone
- Paediatric Ibuprofen
- Paediatric Naproxen
Paediatric Cough, Cold and Allergy Remedies
- Paediatric Allergy Remedies
- Paediatric Cough/Cold Remedies
Paediatric Digestive Remedies
- Paediatric Diarrhoeal Remedies
- Paediatric Indigestion and Heartburn
Remedies
- Paediatric Laxatives
- Paediatric Motion Sickness Remedies
Paediatric Dermatologicals
Nappy (Diaper) Rash Treatments
Paediatric Vitamins and Dietary Supplements

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

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2023 key trends

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Competitive landscape

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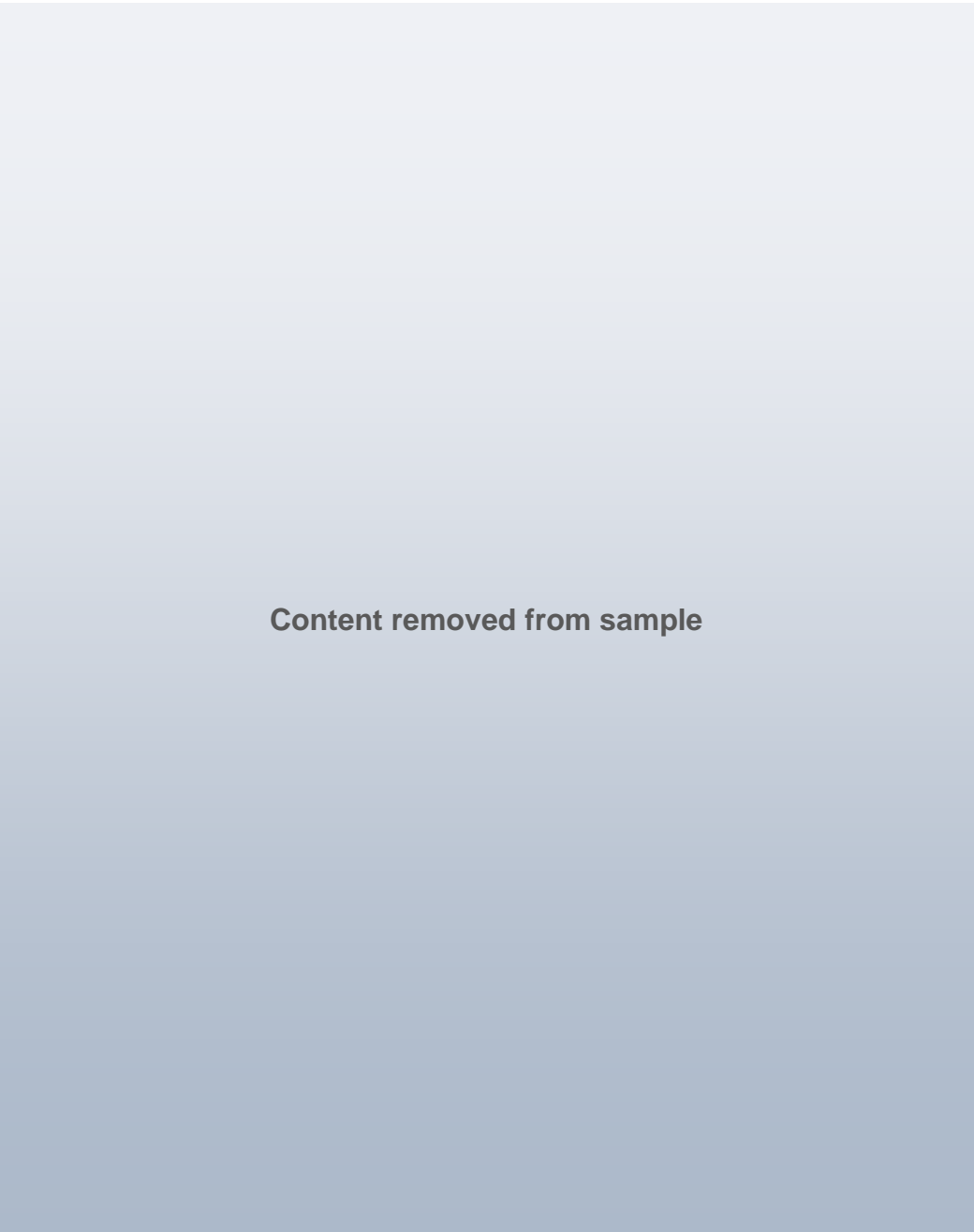
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Retailing developments

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What next for consumer health?



MARKET INDICATORS

Table 7 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 8 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 9 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 10 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

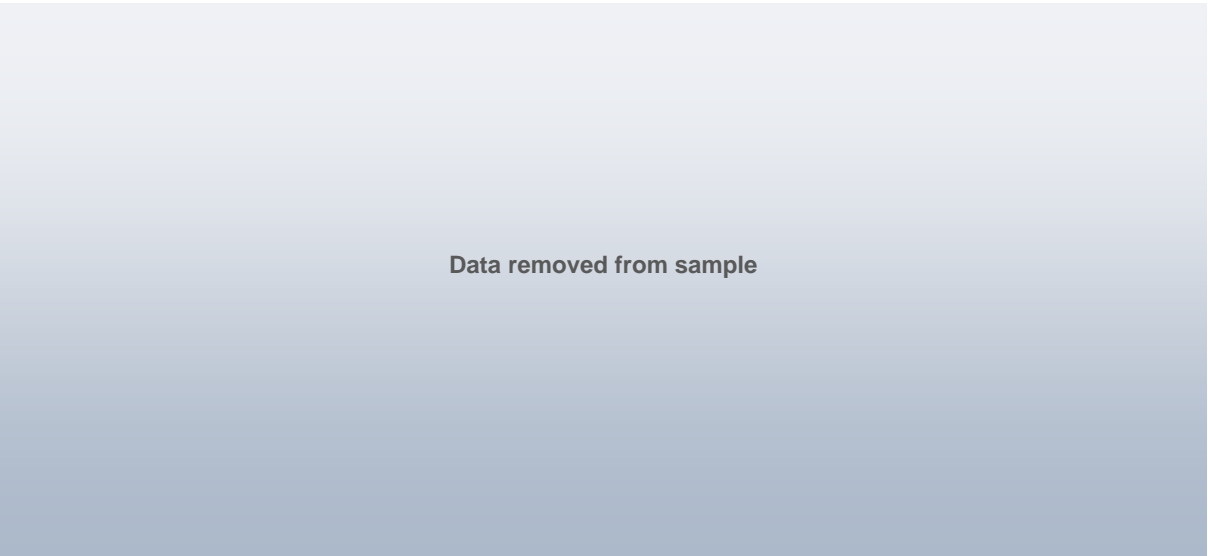
Note 2: Sum of categories is greater than the market size because allergy care is a duplicate of categories found in cough, cold and allergy remedies, dermatologicals and eye care; paediatric consumer health is an aggregate of paediatric categories in OTC and vitamins and dietary supplements; and herbal/traditional 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 11 NBO Company Shares of Consumer Health: % Value 2019-2023

% retail value rsp	2019	2020	2021	2022	2023
Company					

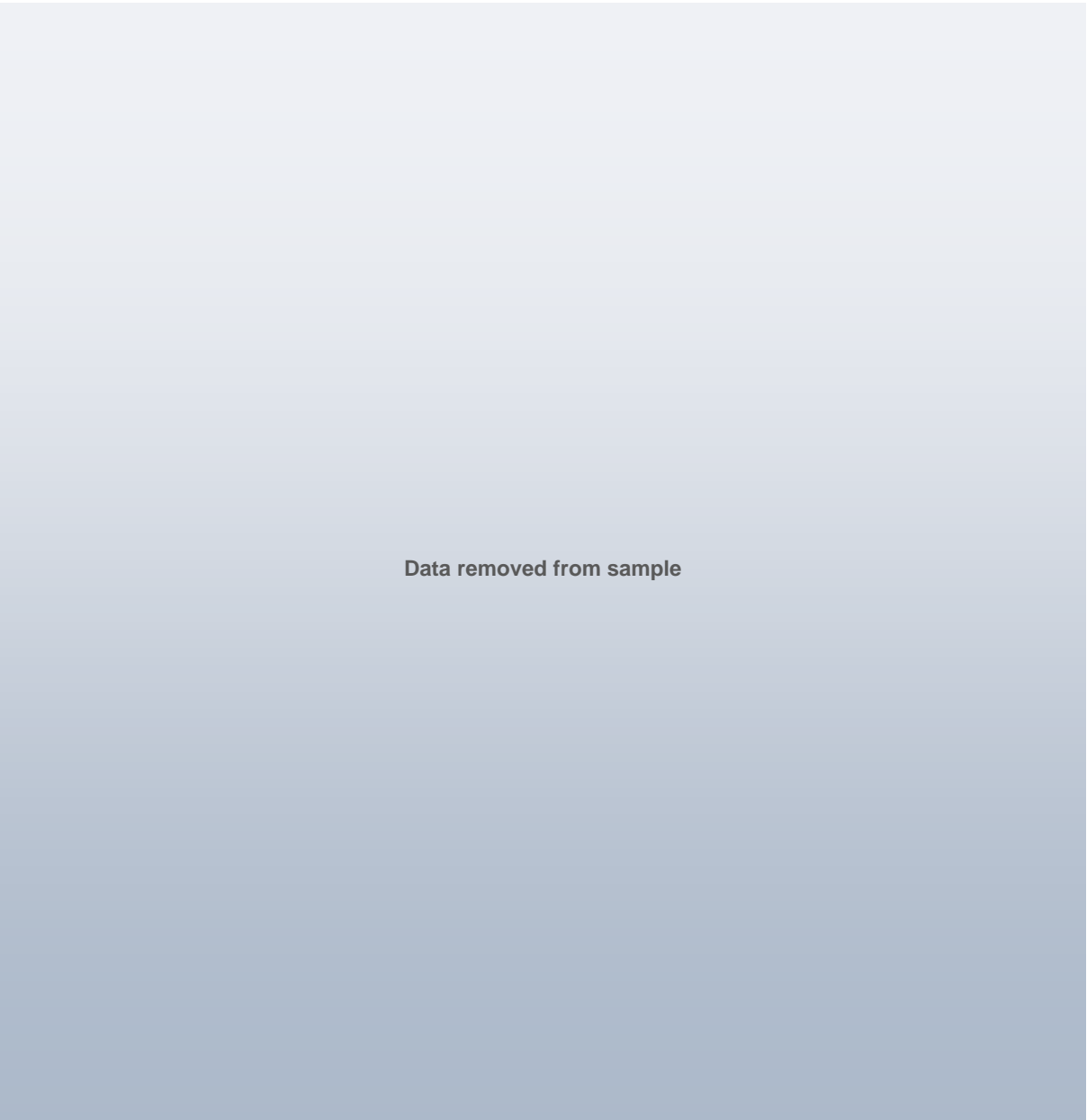
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Consumer Health: % 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 13 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 14 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 15 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
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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

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---- 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 16 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 17 Forecast Sales of Consumer Health by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Consumer Health	<div>Data removed from sample</div>		
OTC			
Sports Nutrition			
Vitamins and Dietary Supplements			
Weight Management and Wellbeing			
Herbal/Traditional Products			
Allergy Care			
Paediatric Consumer Health			

- 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

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Vitamins and dietary supplements registration and classification

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Self-medication/self-care and preventive medicine

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Switches

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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:

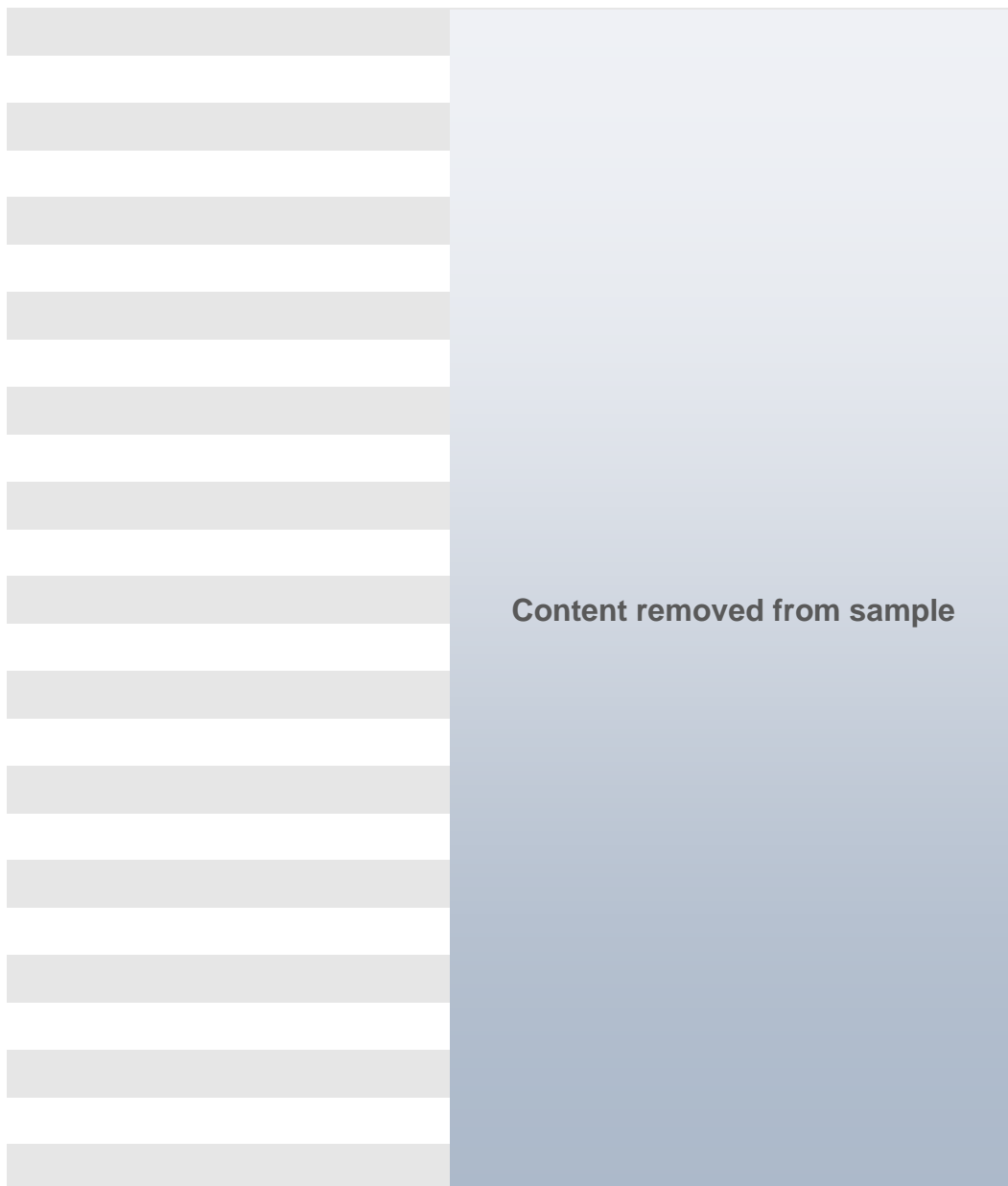
Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

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Source: Euromonitor International