ABIHPEC
ASSOCIAÇÃO BRASILEIRA
DA INDÚSTRIA DE HIGIENE PESSOAL,
PERFUMARIA E COSMÉTICOS

Cosmetic, Toiletry, and Fragrance Industry

2025

ABIHPEC

ABIHPEC is a Private entity that represents the Brazilian industry of Cosmetics, Toiletry, and Fragrances

About

400

Associated companies

Representing approximately

90% of the sector

ABIHPEC operates in the defense of the sector interests in the different public and private spheres, supports actions focused on the industry progress through the development of projects and programs that promote **innovation**, **sustainability**, **regulation**, **internationalization**, the **sector projection**, and **socially responsible corporate attitude**.

Some areas of activity

- Technical and regulatory affairs
- Foreign trade
- Communication & Marketing
- Innovation & Technology
- Market intelligence
- International Businesses
- Environment
- Social Responsibility
- Institutional Relations
- Tax

An **ESSENTIAL*** sector to the country

The Cosmetic, Toiletry, and Fragrance Sector takes care of Brazil, **preventing diseases, offering well-being, strengthening self-esteem and promoting social inclusion**.

* CT&F sector was considered essential by the federal government: Decree n° 10.329/2020

ABIHPEC

Takes care of People

- **Hand hygiene (prevention of Covid-19)**

(liquid and bar soap, alcohol gel)

- **Oral hygiene**
- **Sun protection**
- **Insect repellents**
- **Personal hygiene**

(adult and child disposable diapers, wet wipes, sanitary pads, toilet paper)

- **Respiratory hygiene and etiquette**

(tissues)

- **Treatment and cleaning of skin, hair and nails**

Takes care of the Environment

- **Pioneering in reverse logistics for post consumption packaging**
- **Socio-environmental responsibility**
- **Development of eco-efficient packaging**
- **Sustainable use of biodiversity assets**
- **Supply of raw-materials and supplies by local communities**
- **Mobilization of the supply chain**
- **Climate agenda and Decarbonization of the economy**

Takes care of Society

- **Women empowerment**
- **Increase of self-esteem, well-being, and life quality**
- **Employability**

2024

The CT&F industry mobilizes and promotes development in Brazil.

Local production prevails, leveraging job generation.

- **3rd largest consumer market for CT&F products in the world.***
- **4th market in the global ranking of countries that launch more products yearly**

(1st USA; 2nd China; 3rd India)**

- **Exported in 2024 to 174 countries, reaching a record value of US$884 million. ***

Sources: *Euromonitor, 2024; **Mintel,2024; ***Comexstat/MDIC-SECEX,2024.

ABIHPEC

Brazil in the World

Sales to consumer 2024 – Global CT&F Market

ABIHPEC

Total US$ 640 billion

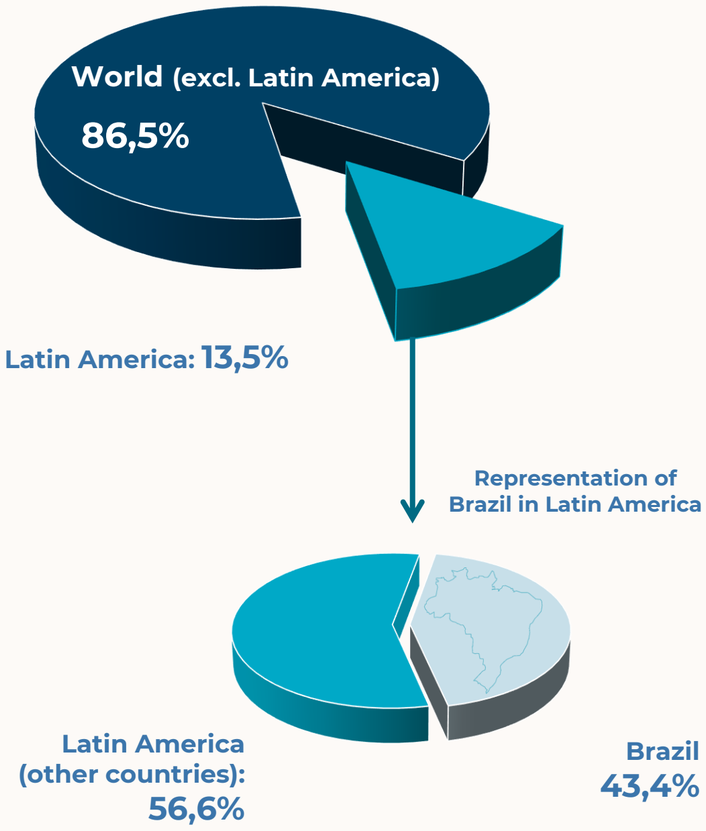
TOP 10 CONSUMER MARKETS

1st	United States	21% | US$ 134,6
2nd	China	12% | US$ 76,6
3rd	Brazil	5,8% | US$ 37,4
4th	Japan	4,6% | US$ 29,5
5th	Germany	4,1% | US$ 26
6th	United Kingdom	3,7% | US$ 23,6
7th	India	3,0% | US$ 19,2
8th	Mexico	2,9% | US$ 18,4
9th	France	2,9% | US$ 18,3
10th	Italy	2,5% | US$ 15,8

BRAZIL'S RANKING BY CATEGORY

2°	Fragrances Men's products Deodorants
3°	Kids products Sun protection Oral hygiene Hair care
4°	Bath products
7°	Makeup
8°	Skincare
10°	Depilatories

Latin America representation in the Global CT&F Market



Source: Euromonitor 2024

Generates around 7.1 million work opportunities

- **Industry**
- **Franchise**
- **Direct Sales Consultancy**
- **Beauty Salons**

Sources: ABIHPEC, ABEVD, ABF, e PNAD-IBGE (feb/2025)

The generation of direct jobs in the industry increased by 7.7% in 2024 compared to 2023, which represents the creation of 11,000 new work opportunities.

Work opportunities per channel

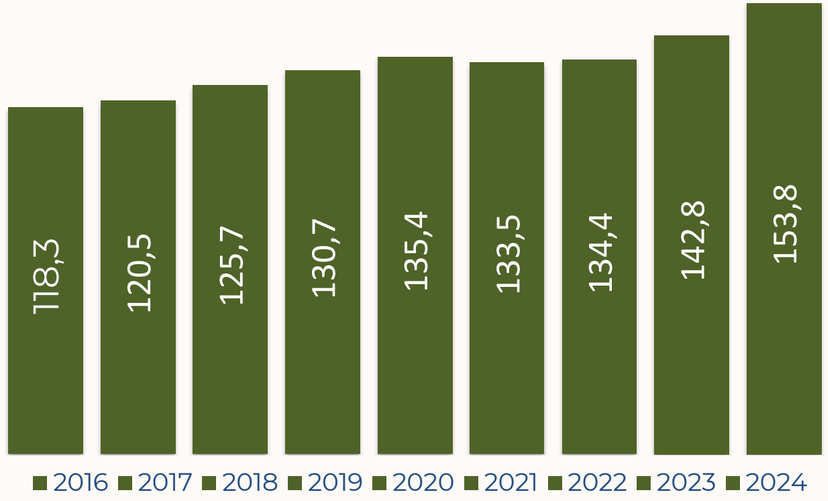
WORK OPPORTUNITIES ('000)										
	2016	2017	2018	2019	2020	2021	2022	2023	2024	Variation 24/23
INDUSTRY	118,3	120,5	125,7	130,7	135,4	133,5	134,4	142,8	153,8	**7,7%**
FRANCHISE	214,6	219,6	236,4	248,5	230,4	107,1	127,1	130,0	141,4	**8,7%**
DIRECT SALES CONSULTANT	4.140,0	3.690,0	3.690,1	3.292,9	3.248,5	2.733,0	2.702,7	3.050,0	3.910,0	**28,2%**
BEAUTY SALONS	1.884,9	2.107,1	2.211,7	2.325,4	1.800,7	2.350,3	2.616,0	2.791,2	2.887,1	**3,4%**
TOTAL	**6.357,8**	**6.137,2**	**6.263,9**	**5.997,5**	**5.414,9**	**5.323,9**	**5.580,1**	**6.114,0**	**7.092,3**	**16,0%**

Source: ABIHPEC, ABEVD, ABF, e PNAD-IBGE - Feb//2025

Direct Jobs and Work Opportunities

Direct Jobs (000's)

7,7%
(2024-2023)

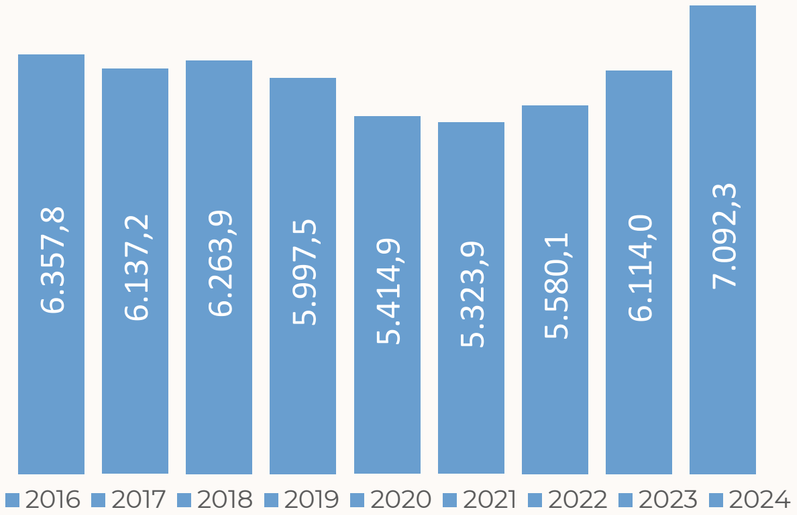


CAGR (2017- 2024): 3,5%

After a drop in the number of direct jobs in 2015 and 2016, the sector has shown continuous growth in the following years, ending 2024 with an increase of 7.7% over 2023, equivalent to 11,000 direct jobs.

Work Opportunities (000's)

16,0%
(2024-2023)



CAGR (2017-2024): 2,1%

There was a significant recovery after the crisis generated by the pandemic, with a resumption of growth and the generation of work opportunities. In 2024, this recovery was consolidated, resulting in a significant increase of 16.0% in total work opportunities, which reached 7.1 million.

Socio-economic impact of the CT&F sector

ABIHPEC

The matrix effect shows the relevance of a sector along the production chain:

- Value added in the other sectors
- Sectorial interrelations
- High income generation capacity (salary mass multiplier)
- High collection capacity (seen in the tax multiplier)

When **R$ 1 billion** is allocated **in the CT&F sector***, it is generated in the Brazilian economy:

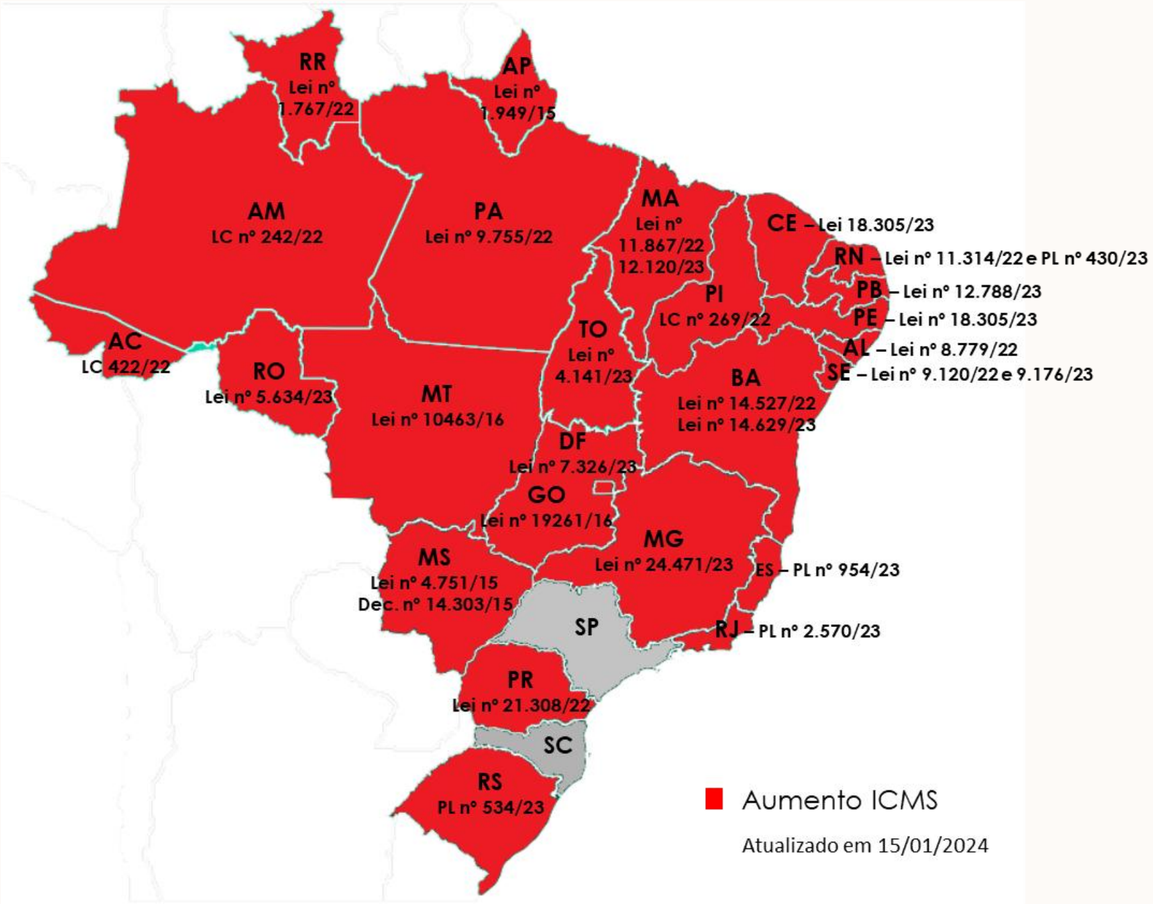
	PRODUCTION (R$)	OCUPATION (Units, for 1 year)	TAXES (R$)	WAGES (R$)
CT&F	1,3 billion	25 Thousand	591 Million	509 Million

As a comparison, the same increase in agriculture or industry generates:

Agriculture	1,2 Billion	41 Thousand	157 Million	321 Million
Industry	1,3 Billion	26 Thousand	346 Million	484 Million

Note: For the analysis, the fragrance, hygiene and cleaning sector was considered - in 2015 values. Employment multiplier includes formal and informal occupations. Source: Prepared by LCA, based on the Resources and Uses Tables of the 2015 System of National Accounts. **Updated in August 2023.**

Tax Map



Source: ABIHPEC in partnership with A2M Consultoria

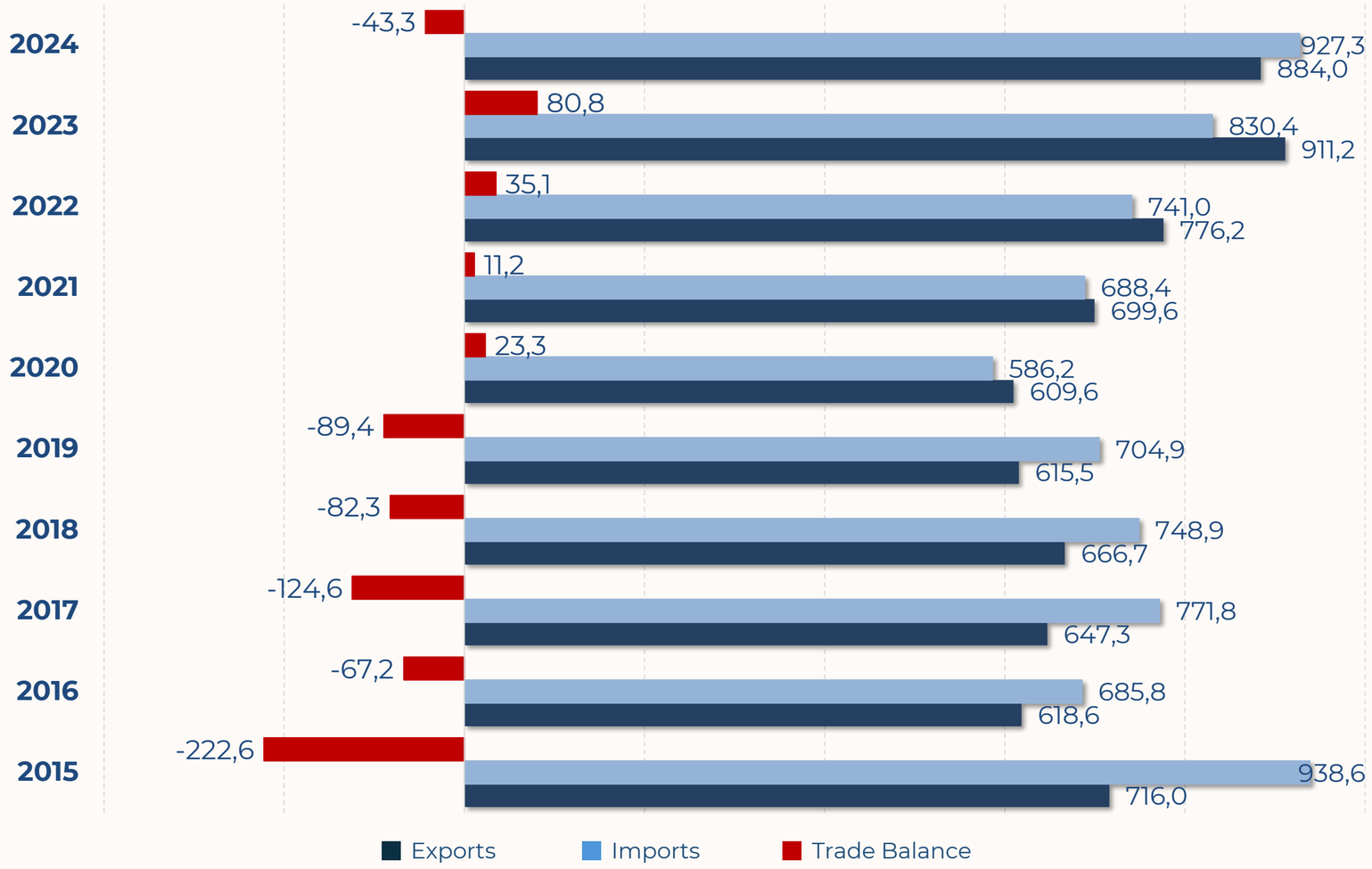
Since 2015, the CT&F sector has been impacted by a series of tax measures that, combined with the unfavorable political and economic scenario, have harmed the industry's results.

The risk of consecutive and indiscriminate measures (IPI and ICMS), under the pretext of increasing resources to the public coffers, has been lowering sales in the sector and, therefore, reducing the collection curves, in an effect contrary to that intended by the government.

The sector was penalized with an increase in ICMS in 24 states and the Federal District, according to the map, in addition to the strong impact caused by the shift of the IPI from the industry to the distributor that occurred in 2015.

In 2024, the scenario will be even more challenging in view of the increase in the modal rate of ICMS approved in several UF's at the end of 2023.

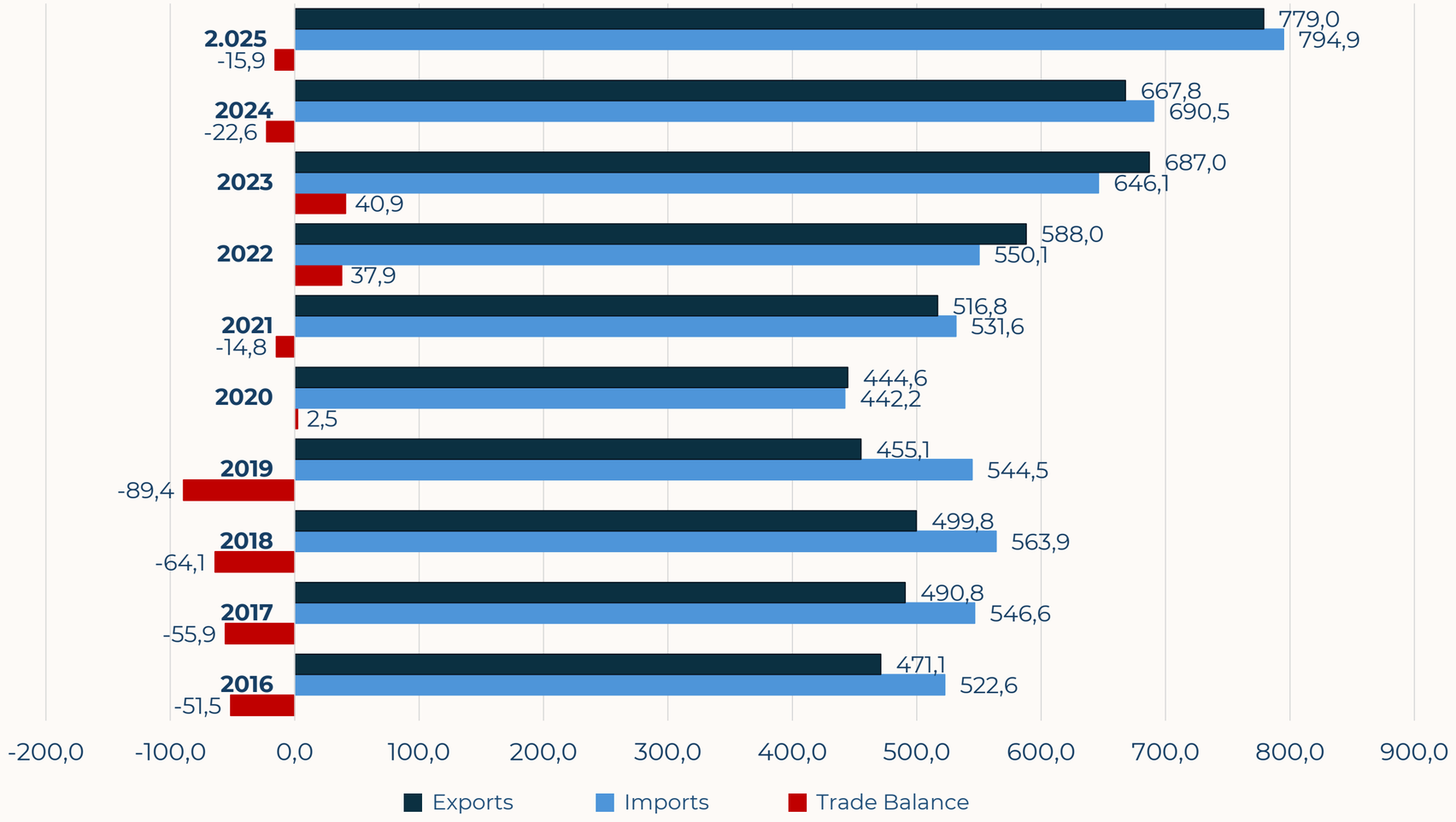
Internacional Trade Balance January - December 2015-2024
Brazilian Exports and Imports of CT&F (Amounts in US$ million - FOB)



Source: ComexStat/MDIC-SECEX

International Trade Balance January - September 2016-2025

Brazilian Exports and Imports of CT&F (Amounts in US$ million – FOB)



Source: ComexStat/MDIC-SECEX

Brazilian CT&F Exports – TOP 15
By Country – January – September 2024/2025

		Value US$ Million FOB				Volume Mil Ton			
Rk	Country	2024	2025	Var (%)	Part (%) 2025	2024	2025	Var (%)	Part (%) 2025
1	Argentina	99,1	160,3	61,7%	20,6%	24,6	43,6	77,2%	19,0%
2	Mexico	86,5	90,6	4,8%	11,6%	14,5	15,6	7,3%	6,8%
3	Chile	65,5	77,0	17,6%	9,9%	16,7	20,0	19,3%	8,7%
4	Colombia	71,9	73,5	2,3%	9,4%	13,0	14,1	8,9%	6,2%
5	Paraguay	57,4	60,9	6,1%	7,8%	37,7	39,8	5,6%	17,4%
6	United States	29,8	47,9	60,7%	6,1%	4,6	15,1	225,8%	6,6%
7	Peru	41,5	42,9	3,5%	5,5%	8,8	9,1	3,2%	4,0%
8	Uruguay	35,2	39,2	11,2%	5,0%	23,7	28,3	19,5%	12,3%
9	Portugal	24,3	30,0	23,4%	3,8%	3,8	5,4	41,9%	2,3%
10	Ecuador	16,4	16,9	3,2%	2,2%	3,2	3,6	13,5%	1,6%
11	Bolivia	16,6	16,0	-3,3%	2,1%	5,6	6,9	22,6%	3,0%
12	Panama	10,1	12,4	22,9%	1,6%	4,1	5,4	32,0%	2,3%
13	Venezuela	13,7	10,8	-20,9%	1,4%	8,2	5,7	-30,0%	2,5%
14	United Arab Emirates	7,1	8,9	24,0%	1,1%	0,7	2,0	174,2%	0,9%
15	India	6,3	7,1	11,6%	0,9%	0,6	0,6	-9,5%	0,3%
	Top 15	**581,3**	**694,3**	**19,4%**	**89,1%**	**169,9**	**215,2**	**26,6%**	**93,9%**
	Total	**667,8**	**779,0**	**16,6%**	**100,0%**	**182,5**	**229,2**	**25,6%**	**100,0%**

Source: ComexStat/MDIC-SECEX

Brazilian CT&F Imports – TOP 15
By Country – January – September 2024/2025

ABIHPEC

		Value US$ Million FOB				Volume Mil Ton			
Rk	Country	2024	2025	Var (%)	Part (%) 2025	2024	2025	Var (%)	Part (%) 2025
1	China	110,9	160,9	45,1%	20,2%	27,4	46,3	68,9%	47,1%
2	France	138,9	155,5	11,9%	19,6%	4,9	5,3	8,2%	5,4%
3	Spain	74,2	80,1	7,9%	10,1%	3,7	4,3	14,5%	4,4%
4	United States	57,8	58,2	0,7%	7,3%	5,2	4,1	-22,5%	4,1%
5	Mexico	43,9	41,6	-5,2%	5,2%	5,3	6,2	15,9%	6,3%
6	Italy	25,1	36,9	47,0%	4,6%	0,8	1,0	32,5%	1,0%
7	South Korea	18,2	25,6	40,7%	3,2%	0,7	1,3	74,9%	1,3%
8	Switzerland	11,1	22,5	101,9%	2,8%	0,1	0,3	88,7%	0,3%
9	Germany	14,5	21,5	48,5%	2,7%	1,7	3,5	100,8%	3,5%
10	India	16,9	21,4	26,6%	2,7%	2,4	2,9	22,7%	3,0%
11	Argentina	36,3	19,9	-45,2%	2,5%	5,1	2,2	-56,1%	2,3%
12	Poland	14,1	19,7	39,5%	2,5%	1,7	2,6	48,3%	2,6%
13	Colombia	24,1	19,6	-18,4%	2,5%	6,5	6,2	-4,3%	6,3%
14	Thailand	8,4	16,2	92,3%	2,0%	0,4	0,7	76,3%	0,7%
15	Canada	9,1	11,5	26,0%	1,4%	0,5	0,6	21,0%	0,6%
	Top 15	**603,5**	**711,0**	**17,8%**	**89,5%**	**66,5**	**87,4**	**31,3%**	**88,9%**
	Total	**690,5**	**794,9**	**15,1%**	**100,0%**	**76,5**	**98,3**	**28,5%**	**100,0%**

Source: ComexStat/MDIC-SECEX

Biodiversity & Climate Changes

ABIHPEC

Biodiversity

ABIHPEC reinforces its commitment with the Environment fostering the **sustainable use of biodiversity** applied to the development of **products and solutions**, and encouraging the **sharing of benefits** from the economic exploration of Brazilian biodiversity involving **access to the genetic heritage and associated traditional knowledge (Law n° 13.123/2015):**

- The sector representation with the **Ministry of Environment (MMA)** and other agencies;
- **Member of CGEN** (Genetic Heritage Management Council);
- Publication of contents on the theme, as well as **technical notes** produced from discussions made in the **Working Group on Biodiversity**.

Climate Changes

Brazil has national targets for the **reduction of greenhouse gas emissions**, extending this commitment to industries, making it essential to **raise awareness** and **adopt the best climate management practices** (measurement, reduction, adaptation).

- **Working Group on Climate Change**
- Participation in **national and international forums and events** (ex. COP29).
- **Dialogue with executive and legislative powers** for monitoring of the climate change regulatory agenda.
- **Guidance and awareness to associated companies** about climate management

Environmental responsibility

Reverse Logistics

1 Million tons of packaging recovered*

Pioneer program for reverse logistics of packaging in general since 2006, **Mãos Pro Futuro Program** carries out actions turned to the recovery and appropriate destination of packaging, after consumption, creating **generation of jobs, income improvement, and social inclusion.**

It also created the **"Mãos Pro Futuro Seal"**, which aims to inform consumers of the **percentage of post-consumer packaging placed on the market by participating companies that is recovered and properly disposed of.**

National Coverage

+5.000 waste pickers participating

199 waste picker organizations

1 Milhão
tons of post-consumption packaging recovered*

*from 2013 until 2024

Ao
Programa Mãos para o Futuro
a gratidão da
Cidade de São Paulo
Câmara Municipal
Prêmio Responsabilidade Socioambiental
Resolução nº 2 de 2 de agosto de 2011
Decreto Legislativo nº 24 de 18 de maio de 2023
Solário Sorchiola, 5 de junho de 2023

www.maosprofuturo.org.br

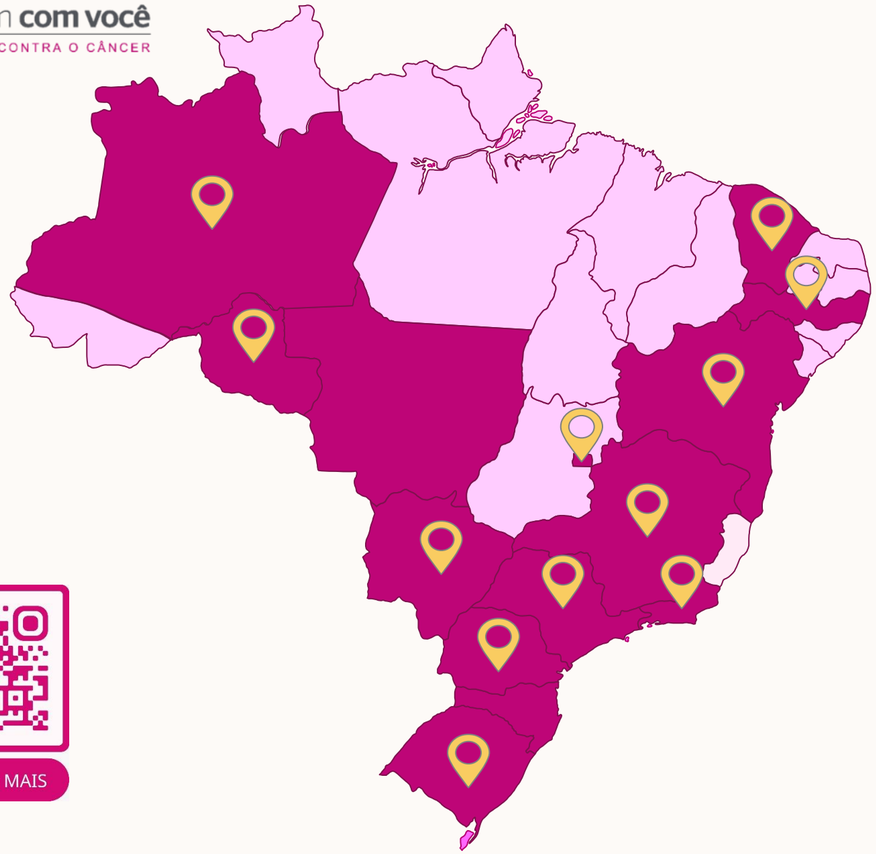
- **200,063 tons of post-consumer packaging recovered in 2024;**
- New Partnerships: **ABIÓPTICA**, in 2024 and **ABRAFATI**, in 2025.
- **National and international acknowledgement**: in 2019 and 2021 by UN ECLAC and by the Municipal Chamber of São Paulo, as sustainability case.

The program directly addresses 14 of the 17 SDGs:

March 2024

De Bem com Você – A Beleza Contra o Câncer

de bem com você
A BELEZA CONTRA O CÂNCER



SAIBA MAIS

The **"De Bem com Você - A Beleza Contra o Câncer"** (Look Good, Feel Better) Program offers self-makeup and self-care workshops to patients undergoing cancer treatment, with the support of the CT&F industry.

Today the program has **56 partner hospitals** in **14 states, 34 municipalities and, since the program began (2012)**, it has assisted **more than 50,000 patients**, with the involvement of more than **200 volunteers.**

The program currently **offers in-person and virtual self-makeup workshops, and also via video-classes.**

In 2024, **10.931 womens were assisted in 610 workshops**, in addition to an agenda of **live streams** with special guests who brought topics related to **oncology, self-esteem, self-care, beauty and well-being.**

In November 2023, the Men's Self-Care workshop began, with the aim of serving men undergoing treatment, thereby improving the self-esteem and emotional health of all beneficiaries. **In 2024, 30 self-care workshops were held for men, serving around 200 cancer patients.**

March/2025

Educação, Dignidade e Beleza - Childhood Brasil – Beleza Negra

The Educação, Dignidade e Beleza (Education, Dignity and Beauty) project aims to **promote employability and entrepreneurship**. In 2023 and 2024, it supported 4 institutions and about **820 learners**: Instituto Profissionalizante da Mangueira (RJ); Crescer Semper Association (SP); Banco da Providência (RJ), Casa do Menor São Miguel Arcanjo (CE).

Saiba Mais

Childhood Brasil, which has been supported by the **ABIHPEC Institute** since 2017, works to guarantee the defense of the rights of children and adolescents with a focus on preventing and confronting sexual violence. **In 2024, more than 35 million people were impacted by Childhood Brasil's content on social media.** We also co-sponsored the screening of the short film "I have a voice" in educational environments in the city of São Paulo, followed by debates on the subject.

The project aims to develop affirmative actions aimed at promoting greater equity and racial representation in the beauty sector.

It was born from the initiative of the **CPDCN – Participation Council, Development of the Black Community of the Secretariat of Justice and Citizenship of SP**, with support from the extinct **CORES – Social Responsibility Committee of FIES**P, technical support from **SEBRAE – SP** and coordination of the **ABIHPEC Institute.**

Among the actions promoted, the following stand out: The training of black entrepreneurs in the beauty sector; support for black people in professional training courses in the CT&F sector; actions to promote greater representation of black people in management positions in companies in the sector, among others.

In 2024, we offer 3 scholarships in the olfactory evaluators course at Paralela Escola Olfactory with French methodology.

ABIHPEC
ASSOCIAÇÃO BRASILEIRA
DA INDÚSTRIA DE HIGIENE PESSOAL,
PERFUMARIA E COSMÉTICOS

Contact:

comunicacao@abihpec.org.br

Av. Paulista, 1313 - 10° andar, Cj. 1080 - Bela Vista, São Paulo/SP - 01311-923
Tel: +55 11 3372-9899

www.abihpec.org.br