



# Cosmetic, Toiletry, and Fragrance Industry

2026

**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



## 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**

# 2025

**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)\*\*
- **Exports in 2025 to nearly 200 countries, reaching a value of \$1.061 billion.\*\*\***











Sources: \*Euromonitor, 2024; \*\*Mintel,2025; \*\*\*Comexstat/MDIC-SECEX,2025.

# Brazil in the World

## Sales to consumer 2024 – Global CT&F Market

Total US\$ 640 billion

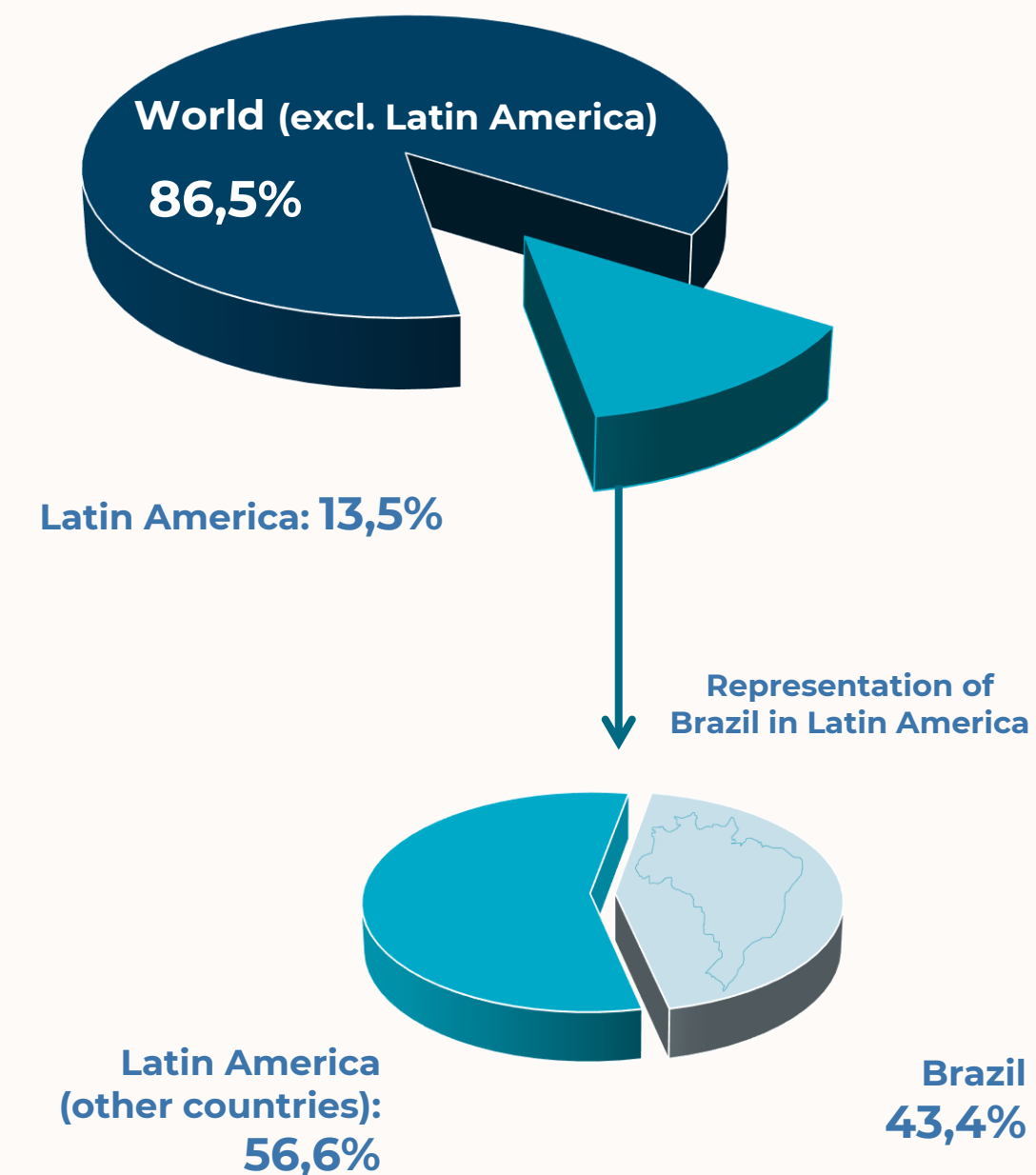
TOP 10 CONSUMER MARKETS

|      |                |                  |  |
|------|----------------|------------------|--|
| 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

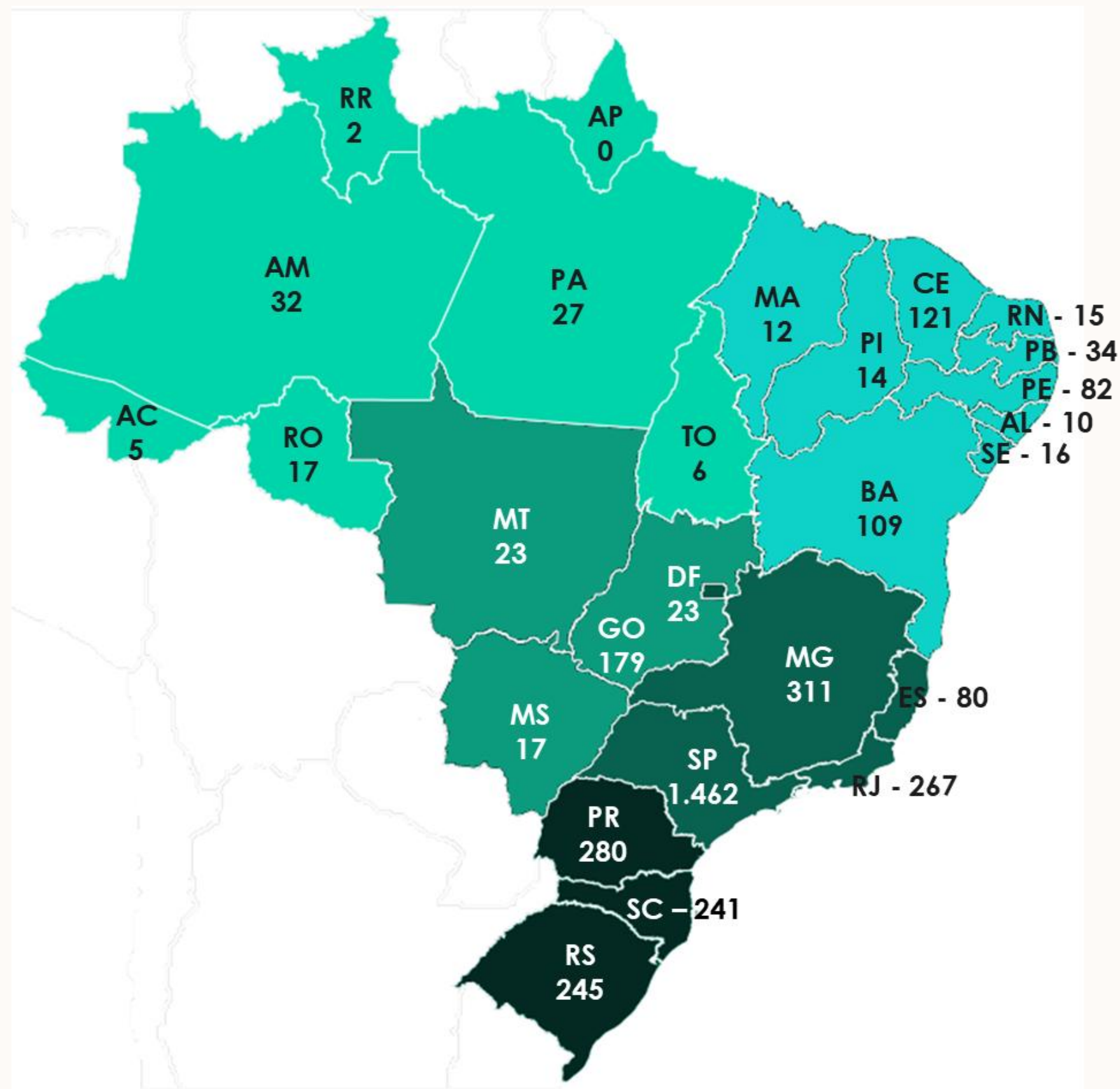
- 2° Fragrances  
Men's products  
Deodorants
- 3° Kids products  
Sun protection  
Oral hygiene  
Hair care
- 4° Bath products
- 7° Makeup
- 8° Skincare
- 10° Depilatories

### Latin America representation in the Global CT&F Market



Source: Euromonitor 2024

# An Entrepreneur Sector: CT&F companies in Brazil



|               |              |
|---------------|--------------|
| Central-West  | 242          |
| Northeast     | 413          |
| North         | 89           |
| Southeast     | 2.120        |
| South         | 766          |
| <b>Brazil</b> | <b>3.630</b> |

Updated: 07/07/2025

## Generates around 7.1 million work opportunities

- Industry
- Franchise
- Direct Sales Consultancy
- Beauty Salons

Sources: ABIHPEC, ABEVD, ABF, e PNAD-IBGE (mar/2026)



The generation of direct jobs in the industry increased by 1.4% in 2025 compared to 2024, which represents the creation of 2,100 new work opportunities.



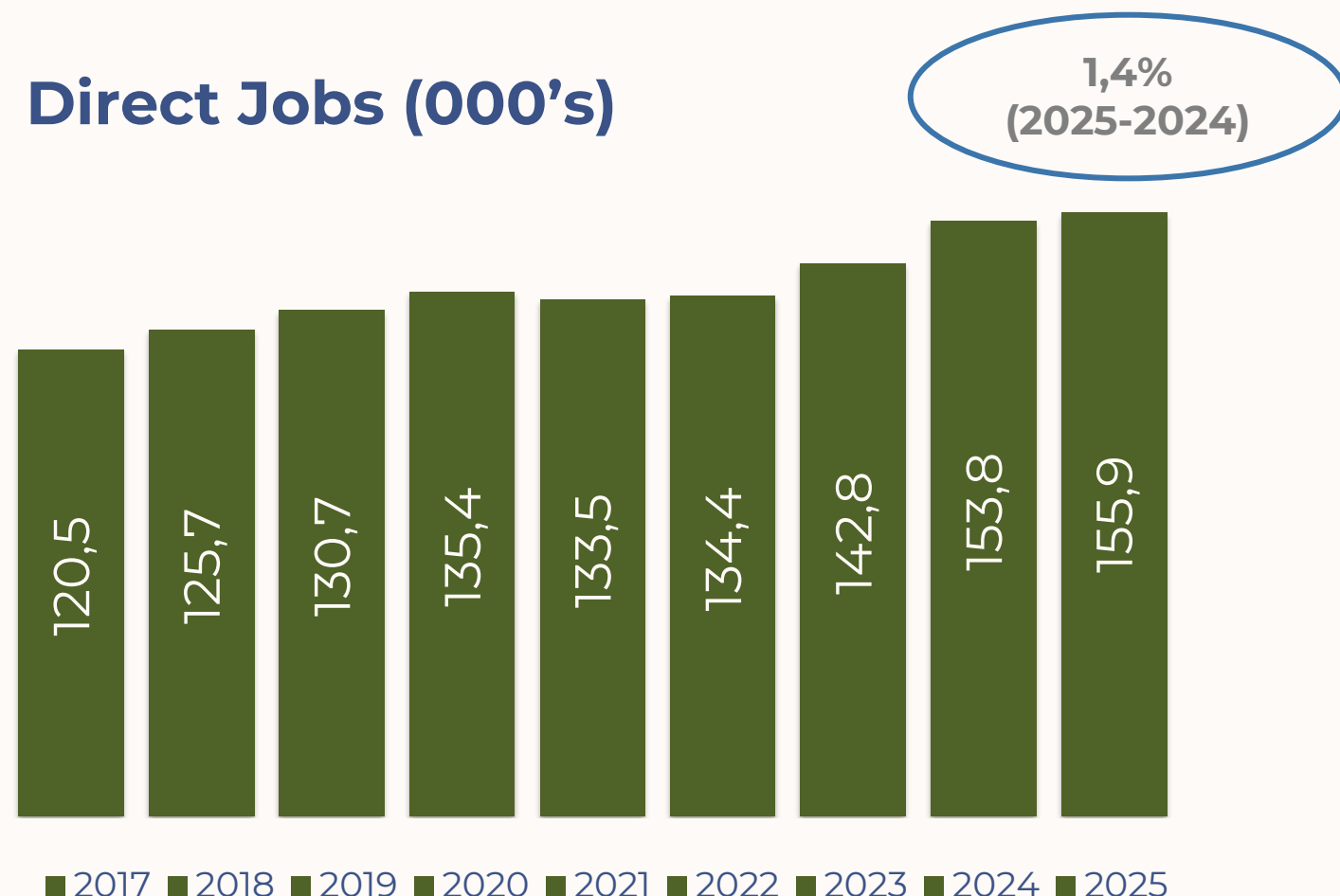
## Work opportunities per channel

| WORK OPPORTUNITIES ('000)      |                |                |                |                |                |                |                |                |                |                |                 |
|--------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------|
|                                | 2016           | 2017           | 2018           | 2019           | 2020           | 2021           | 2022           | 2023           | 2024           | 2025           | Variation 25/24 |
| <b>INDUSTRY</b>                | 118,3          | 120,5          | 125,7          | 130,7          | 135,4          | 133,5          | 134,4          | 142,8          | 153,8          | 155,9          | <b>1,4%</b>     |
| <b>FRANCHISE</b>               | 214,6          | 219,6          | 236,4          | 248,5          | 230,4          | 107,1          | 127,1          | 130,0          | 141,4          | 141,4          | <b>0,0%</b>     |
| <b>DIRECT SALES CONSULTANT</b> | 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        | 4.075,6        | <b>4,2%</b>     |
| <b>BEAUTY SALONS</b>           | 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        | 2.729,5        | <b>-5,5%</b>    |
| <b>TOTAL</b>                   | <b>6.357,8</b> | <b>6.137,2</b> | <b>6.263,9</b> | <b>5.997,5</b> | <b>5.414,9</b> | <b>5.323,9</b> | <b>5.580,1</b> | <b>6.114,0</b> | <b>7.092,3</b> | <b>7.102,3</b> | <b>0,1%</b>     |

Source: ABIHPEC, ABEVD, ABF, e PNAD-IBGE - Mar//2026

## Direct Jobs and Work Opportunities

### Direct Jobs (000's)



CAGR (2018- 2025): 3,1%

After a decline in the number of direct jobs in 2015 and 2016, the sector has shown steady growth in subsequent years, ending 2025 with a 1.4% increase over 2024, equivalent to 2,100 direct jobs.

### Work Opportunities (000's)



CAGR (2018-2025): 1,8%

There was a significant recovery following the crisis caused by the pandemic, with a return to growth and the creation of job opportunities. By 2025, this recovery had taken hold, resulting in a notable increase of 0.1% in the total number of job opportunities, which reached 7.1 million.

## Socio-economic impact of the CT&F sector

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:

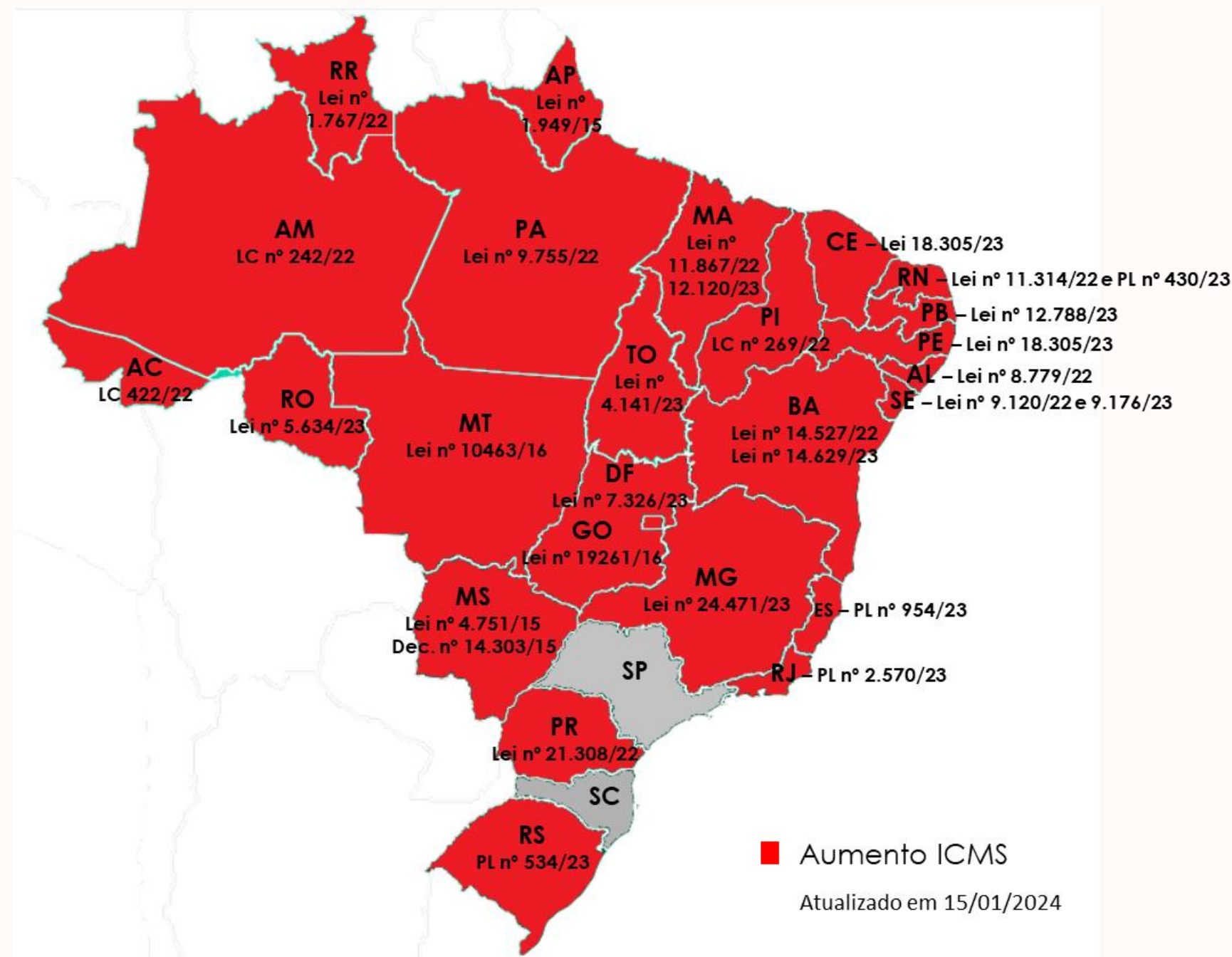
|      | PRODUCTION<br>(R\$) | OCCUPATION<br>(Units, for 1 year) | TAXES<br>(R\$)     | WAGES<br>(R\$)     |
|------|---------------------|-----------------------------------|--------------------|--------------------|
| CT&F | <b>1,3 Billion</b>  | <b>25 Thousand</b>                | <b>591 Million</b> | <b>509 Million</b> |

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

|             |                    |                    |                    |                    |
|-------------|--------------------|--------------------|--------------------|--------------------|
| Agriculture | <b>1,2 Billion</b> | <b>41 Thousand</b> | <b>157 Million</b> | <b>321 Million</b> |
| Industry    | <b>1,3 Billion</b> | <b>26 Thousand</b> | <b>346 Million</b> | <b>484 Million</b> |

**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



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.

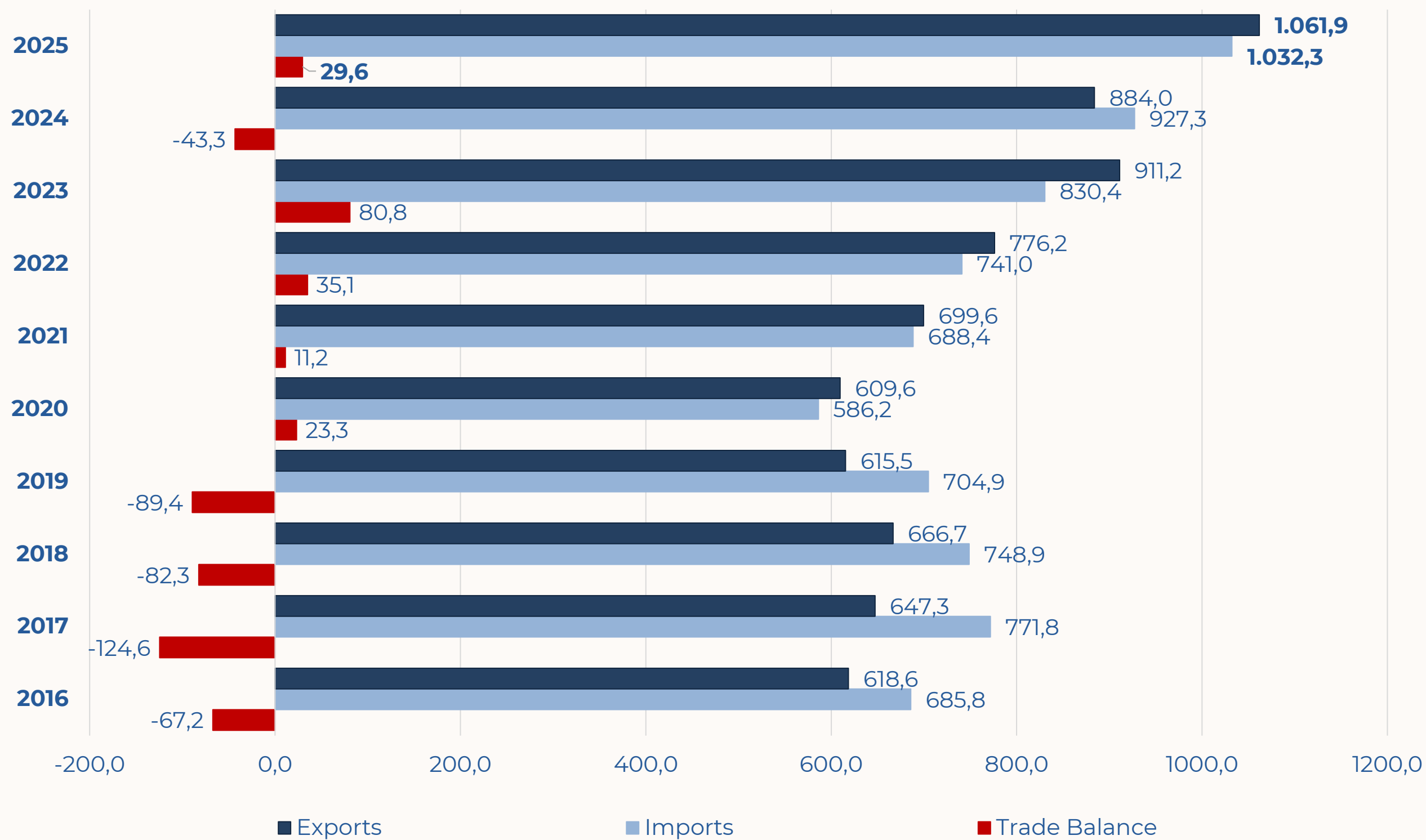
The sector was penalized with an increase in ICMS in 24 states and the Federal District, according to the map, in addition to the strong impact caused by the shift of the IPI from the industry to the distributor that occurred in 2015.

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.

Source: ABIHPEC in partnership with A2M Consultoria

# Internacional Trade Balance January - December 2016-2025

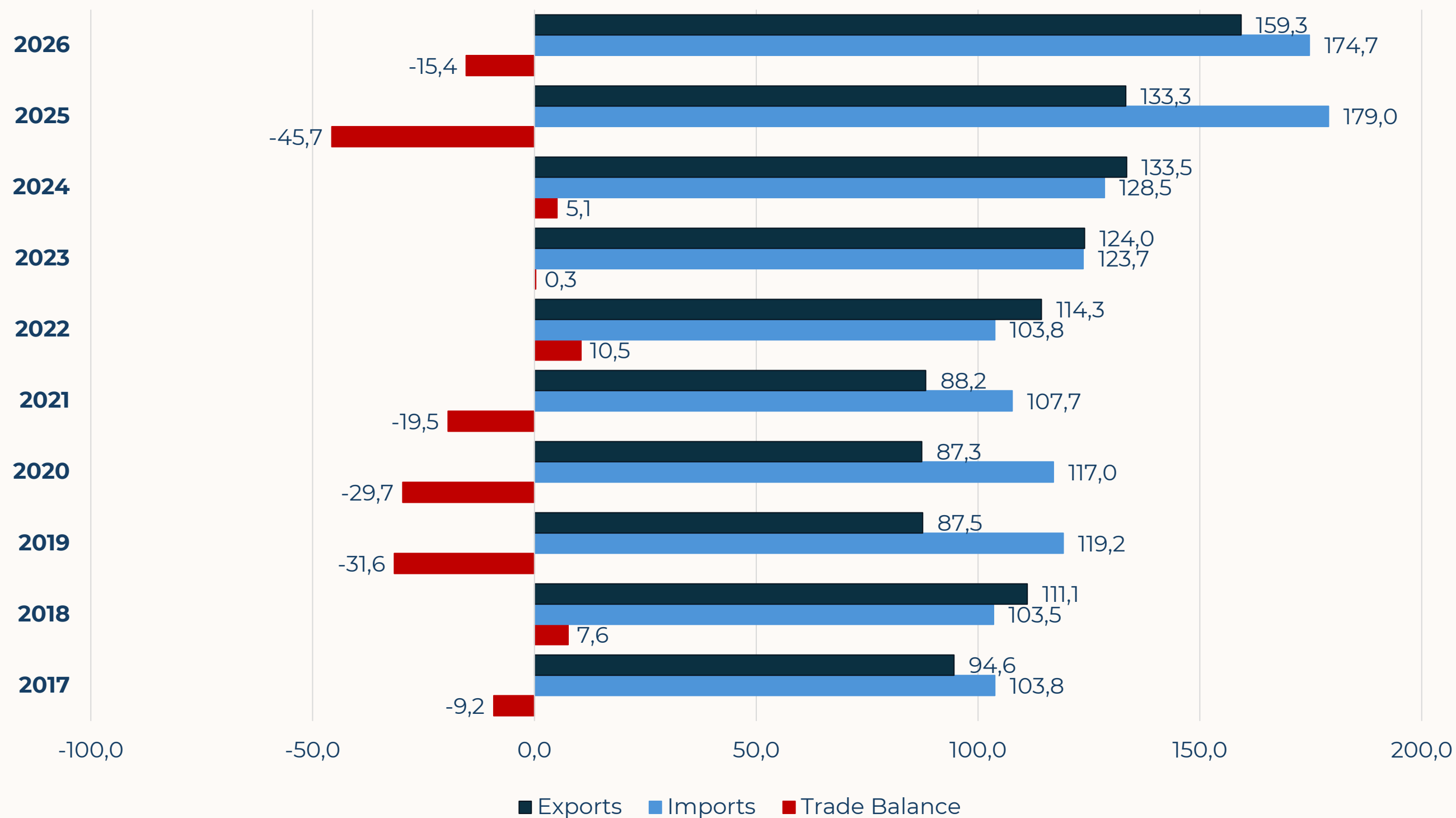
## Brazilian Exports and Imports of CT&F (Amounts in US\$ million - FOB)



Source: ComexStat/MDIC-SECEX

# Trade Balance January–February 2017–2026

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



Fonte: ComexStat/MDIC-SECEX

## Brazilian CT&F Exports – TOP 15 By Country – January–February 2025/2026

| Rk            | Country              | Value US\$ Million FOB |              |              |               | Volume Mil Ton |             |              |               |
|---------------|----------------------|------------------------|--------------|--------------|---------------|----------------|-------------|--------------|---------------|
|               |                      | 2025                   | 2026         | Var (%)      | Part (%) 2026 | 2025           | 2026        | Var (%)      | Part (%) 2026 |
| 1             | Argentina            | 24,8                   | 38,0         | 52,9%        | 23,8%         | 6,4            | 11,5        | 77,7%        | 25,4%         |
| 2             | Chile                | 13,1                   | 18,3         | 40,0%        | 11,5%         | 3,3            | 4,3         | 30,1%        | 9,6%          |
| 3             | Colombia             | 13,3                   | 18,1         | 36,0%        | 11,4%         | 2,6            | 3,6         | 39,5%        | 7,9%          |
| 4             | Mexico               | 16,0                   | 15,2         | -5,1%        | 9,5%          | 2,9            | 2,2         | -22,4%       | 4,9%          |
| 5             | Paraguay             | 11,8                   | 14,3         | 20,7%        | 9,0%          | 8,1            | 8,0         | -1,0%        | 17,8%         |
| 6             | Uruguay              | 7,6                    | 9,0          | 18,2%        | 5,6%          | 5,5            | 5,9         | 8,3%         | 13,1%         |
| 7             | Peru                 | 7,6                    | 7,9          | 4,6%         | 5,0%          | 1,8            | 1,3         | -23,6%       | 3,0%          |
| 8             | Portugal             | 4,9                    | 4,5          | -7,0%        | 2,8%          | 0,9            | 0,8         | -16,8%       | 1,7%          |
| 9             | United States        | 5,1                    | 3,9          | -23,6%       | 2,5%          | 1,0            | 0,7         | -28,0%       | 1,6%          |
| 10            | Netherlands          | 0,7                    | 3,5          | 379,2%       | 2,2%          | 0,1            | 0,3         | 219,6%       | 0,8%          |
| 11            | Bolivia              | 3,0                    | 3,2          | 5,5%         | 2,0%          | 1,3            | 1,3         | 2,8%         | 2,9%          |
| 12            | Ecuador              | 3,1                    | 2,7          | -10,9%       | 1,7%          | 0,5            | 0,6         | 31,1%        | 1,4%          |
| 13            | Venezuela            | 2,7                    | 1,8          | -33,4%       | 1,1%          | 1,4            | 0,9         | -38,4%       | 2,0%          |
| 14            | United Arab Emirates | 1,3                    | 1,7          | 31,2%        | 1,1%          | 0,2            | 0,4         | 110,6%       | 0,9%          |
| 15            | Panama               | 1,3                    | 1,7          | 30,8%        | 1,1%          | 0,4            | 0,7         | 67,2%        | 1,5%          |
| <b>Top 15</b> |                      | <b>116,4</b>           | <b>143,9</b> | <b>23,6%</b> | <b>90,3%</b>  | <b>36,4</b>    | <b>42,7</b> | <b>17,2%</b> | <b>94,6%</b>  |
| <b>Total</b>  |                      | <b>133,3</b>           | <b>159,3</b> | <b>19,5%</b> | <b>100,0%</b> | <b>39,3</b>    | <b>45,1</b> | <b>14,9%</b> | <b>100,0%</b> |

Source: ComexStat/MDIC-SECEX

## Brazilian CT&F Imports – TOP 15 By Country – January-February 2025/2026

| Rk            | Country       | Value US\$ Million FOB |              |              |               | Volume Mil Ton |             |              |               |
|---------------|---------------|------------------------|--------------|--------------|---------------|----------------|-------------|--------------|---------------|
|               |               | 2025                   | 2026         | Var (%)      | Part (%) 2026 | 2025           | 2026        | Var (%)      | Part (%) 2026 |
| 1             | China         | 41,6                   | 44,0         | 5,8%         | 25,2%         | 12,9           | 13,7        | 6,2%         | 59,0%         |
| 2             | France        | 33,7                   | 33,5         | -0,7%        | 19,2%         | 1,2            | 1,0         | -10,8%       | 4,5%          |
| 3             | Spain         | 15,9                   | 19,9         | 25,5%        | 11,4%         | 0,8            | 0,8         | -0,4%        | 3,6%          |
| 4             | United States | 12,5                   | 10,9         | -12,2%       | 6,3%          | 1,1            | 0,8         | -24,9%       | 3,4%          |
| 5             | Mexico        | 6,3                    | 7,7          | 21,2%        | 4,4%          | 0,3            | 0,5         | 49,7%        | 2,0%          |
| 6             | Italy         | 7,7                    | 7,3          | -4,8%        | 4,2%          | 0,3            | 0,2         | -12,6%       | 1,0%          |
| 7             | South Korea   | 8,7                    | 5,9          | -32,1%       | 3,4%          | 1,2            | 0,6         | -47,6%       | 2,6%          |
| 8             | Switzerland   | 3,6                    | 5,5          | 54,4%        | 3,2%          | 0,6            | 0,7         | 20,3%        | 3,0%          |
| 9             | Germany       | 4,2                    | 5,5          | 30,4%        | 3,1%          | 0,8            | 0,6         | -31,7%       | 2,5%          |
| 10            | India         | 4,8                    | 3,4          | -29,4%       | 2,0%          | 0,6            | 0,3         | -45,5%       | 1,5%          |
| 11            | Poland        | 3,7                    | 3,0          | -16,8%       | 1,7%          | 1,2            | 1,0         | -17,0%       | 4,2%          |
| 12            | Colombia      | 4,4                    | 2,8          | -35,7%       | 1,6%          | 0,1            | 0,0         | -53,2%       | 0,1%          |
| 13            | Argentina     | 6,3                    | 2,5          | -60,4%       | 1,4%          | 0,8            | 0,3         | -65,6%       | 1,3%          |
| 14            | Thailand      | 2,9                    | 2,2          | -23,8%       | 1,3%          | 0,7            | 0,3         | -54,9%       | 1,3%          |
| 15            | Canada        | 1,7                    | 2,2          | 29,6%        | 1,2%          | 0,2            | 0,2         | 38,1%        | 0,9%          |
| <b>Top 15</b> |               | <b>157,9</b>           | <b>156,4</b> | <b>-1,0%</b> | <b>89,5%</b>  | <b>22,6</b>    | <b>21,1</b> | <b>-6,9%</b> | <b>90,9%</b>  |
| <b>Total</b>  |               | <b>179,0</b>           | <b>174,7</b> | <b>-2,4%</b> | <b>100,0%</b> | <b>24,9</b>    | <b>23,2</b> | <b>-7,1%</b> | <b>100,0%</b> |

Source: ComexStat/MDIC-SECEX



# Sector Repositioning Campaign



## Beauty & Personal Care Sector. Care to make it happen.

A campaign that introduces the concept of **integrated care** in a new way—encompassing **physical, mental, and social aspects**.

**Watch the full movie:**





## Contact:



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