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

Cosmetic, Toiletry, and Fragrance Industry

2026

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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

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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, 2025; **Mintel,2025; ***Comexstat/MDIC-SECEX,2025.

Worldwide overview of the HPPC sector

Global HPPC Market 2025 (Consumer Data)

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Total $631 billion

TOP 10 CONSUMER MARKET

1º United States
20,6% | US$ 130,3

2º China
12,2% | US$ 76,8

3º Brazil
5,3% | US$ 33,4

4º Japan
4,6% | US$ 28,9

5º Germany
4,1% | US$ 25,8

6º United Kingdom
3,9% | US$ 24,6

7º India
3,2% | US$ 20,1

8º France
2,8% | US$ 17,7

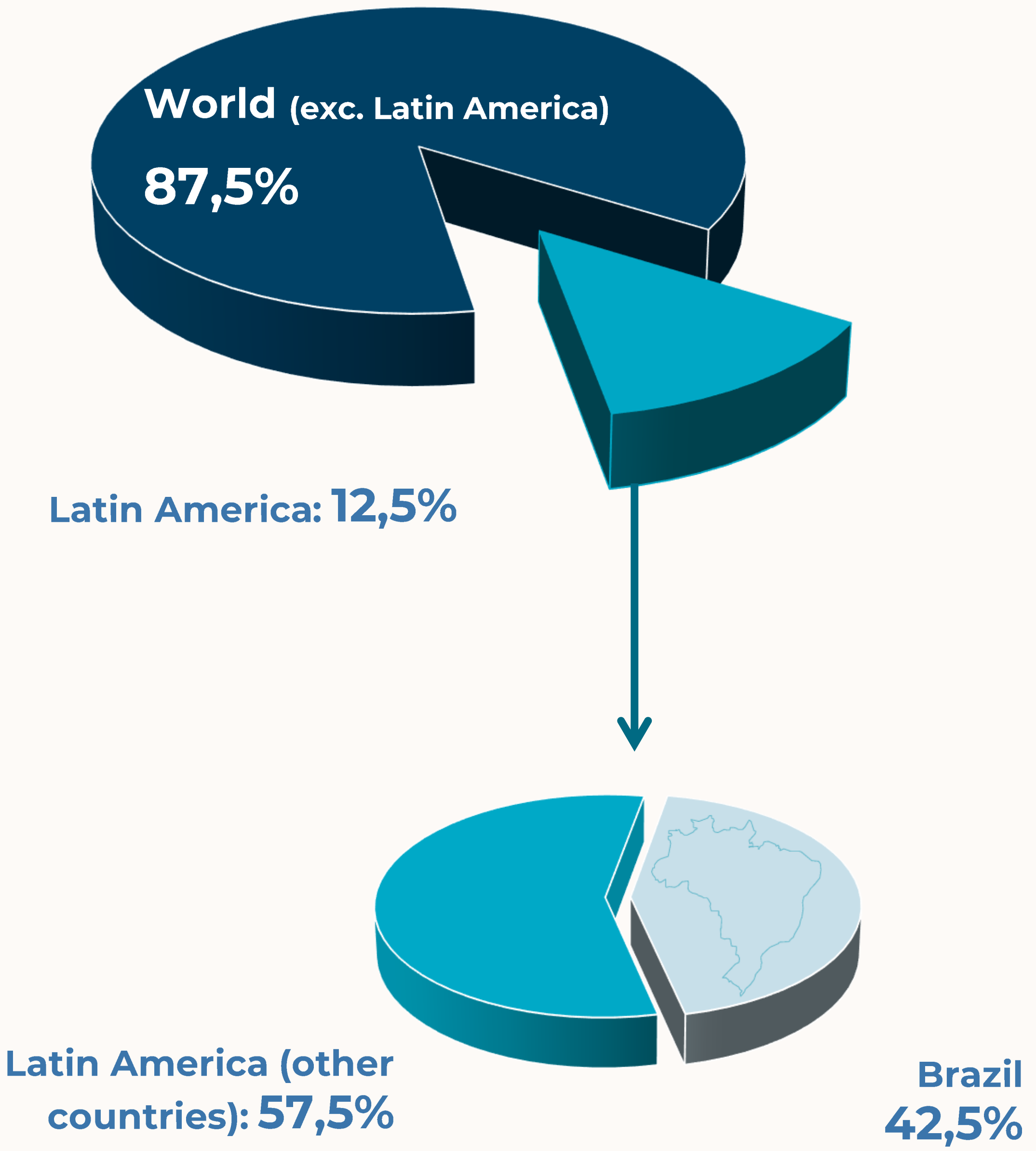
9º Mexico
2,6% | US$ 16,3

10º Italy
2,5% | US$ 16,0

Consumption in Brazil by category (% of the BR market)

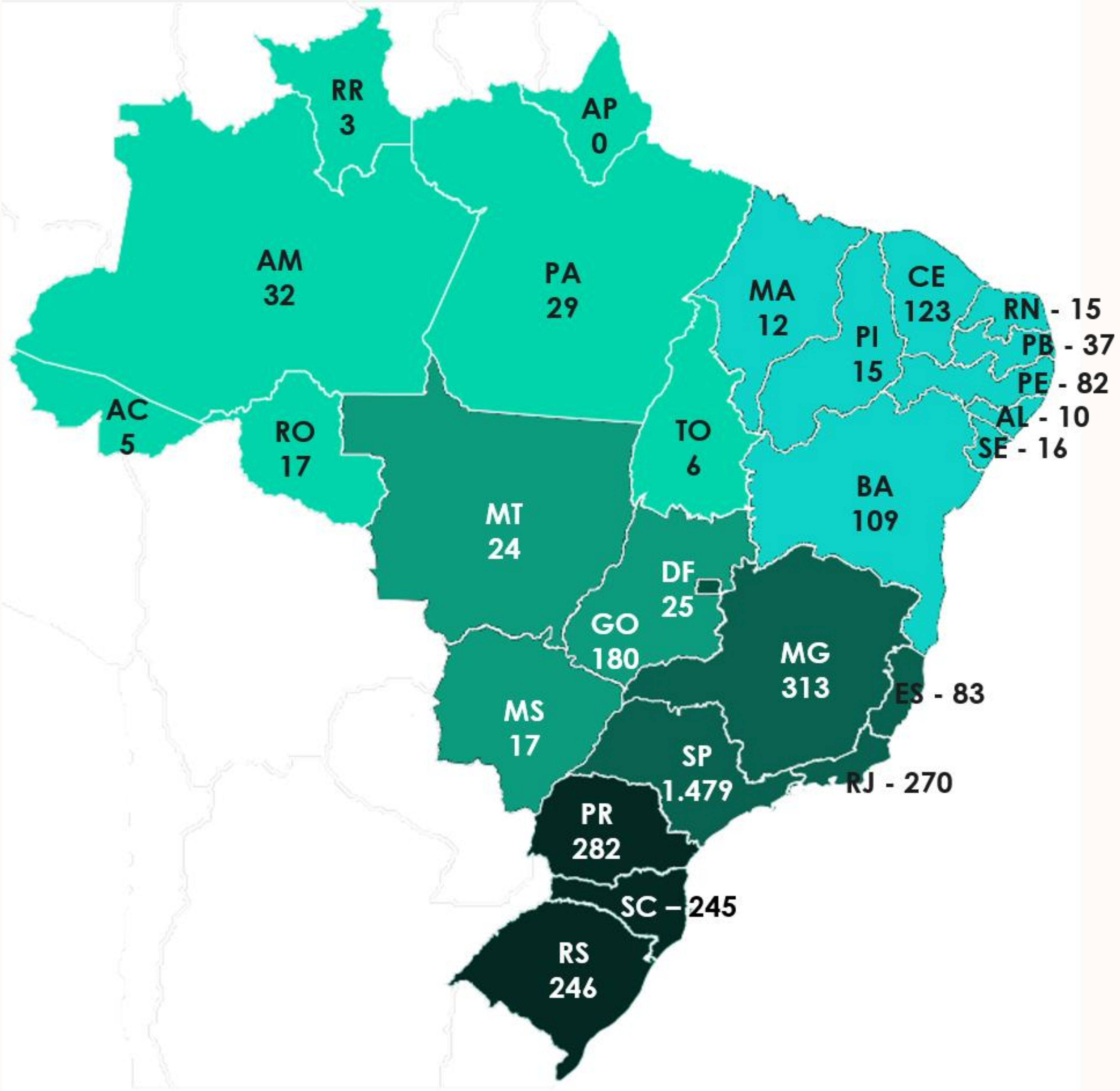
Category	%
Fragrances	27,0%
Men's Products	19,0%
Hair Care	18,9%
Skincare	12,0%
Oral Hygiene	8,4%
Antiperspirant	7,9%
Bath Products	7,6%
Makeup	7,4%
Children's Products	4,4%
Sun Protection	3,2%
Depilatories	0,4%

Representativeness Latin America



Source: Euromonitor 2025

An Entrepreneur Sector: CT&F companies in Brazil



Central-West	246
Northeast	419
North	92
Southeast	2.145
South	773
Brazil	**3.675**

Updated: 10-22-2025

Generates around 6.9 million work opportunities

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- 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

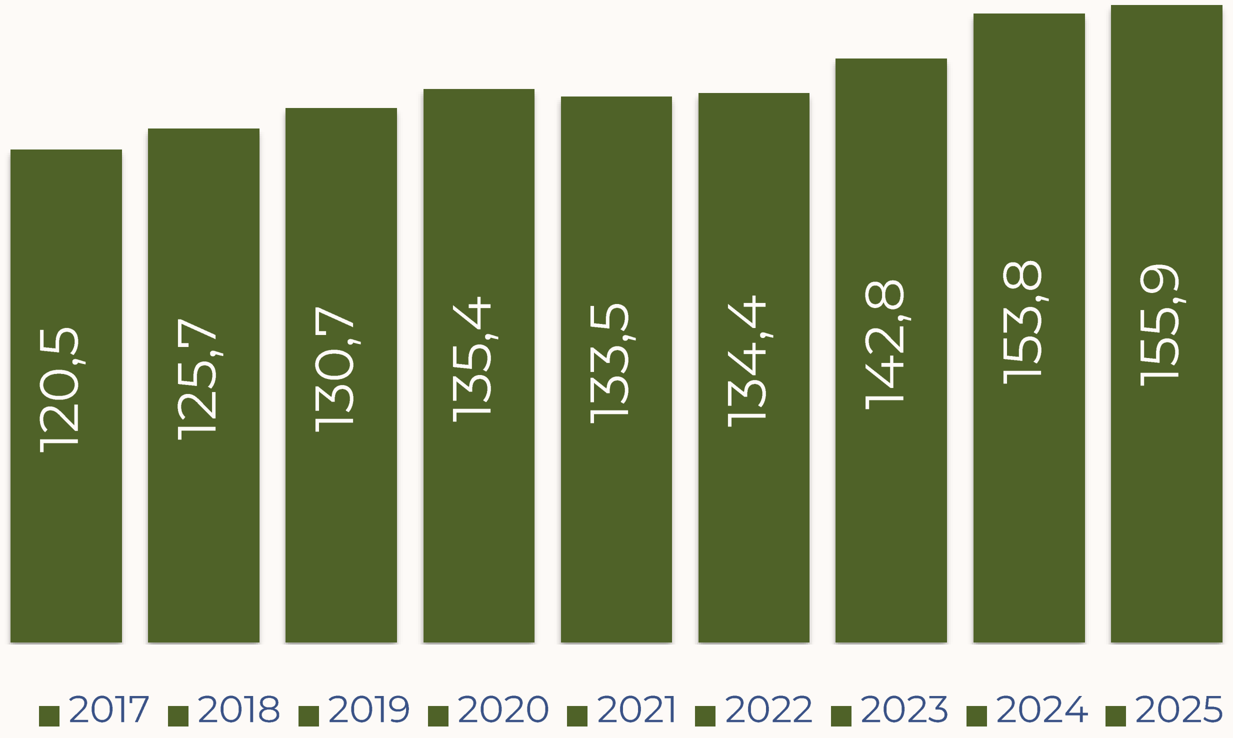
WORK OPPORTUNITIES ('000)											
	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Variação 25/24
INDUSTRY	118,3	120,5	125,7	130,7	135,4	133,5	134,4	142,8	153,8	155,9	**1,4%**
FRANCHISE	214,6	219,6	236,4	248,5	230,4	107,1	127,1	130,0	141,4	115,4	**-18,4%**
DIRECT SALES CONSULTANT	4.140,0	3.690,0	3.690,1	3.292,9	3.248,5	2.733,0	2.702,7	3.050,0	3.874,0	3.890,0	**0,4%**
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	2.729,5	**-5,5%**
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**	**7.056,3**	**6.890,8**	**-2,3%**

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

Direct Jobs and Work Opportunities

Direct Jobs (000's)

1,4%
(2025-2024)

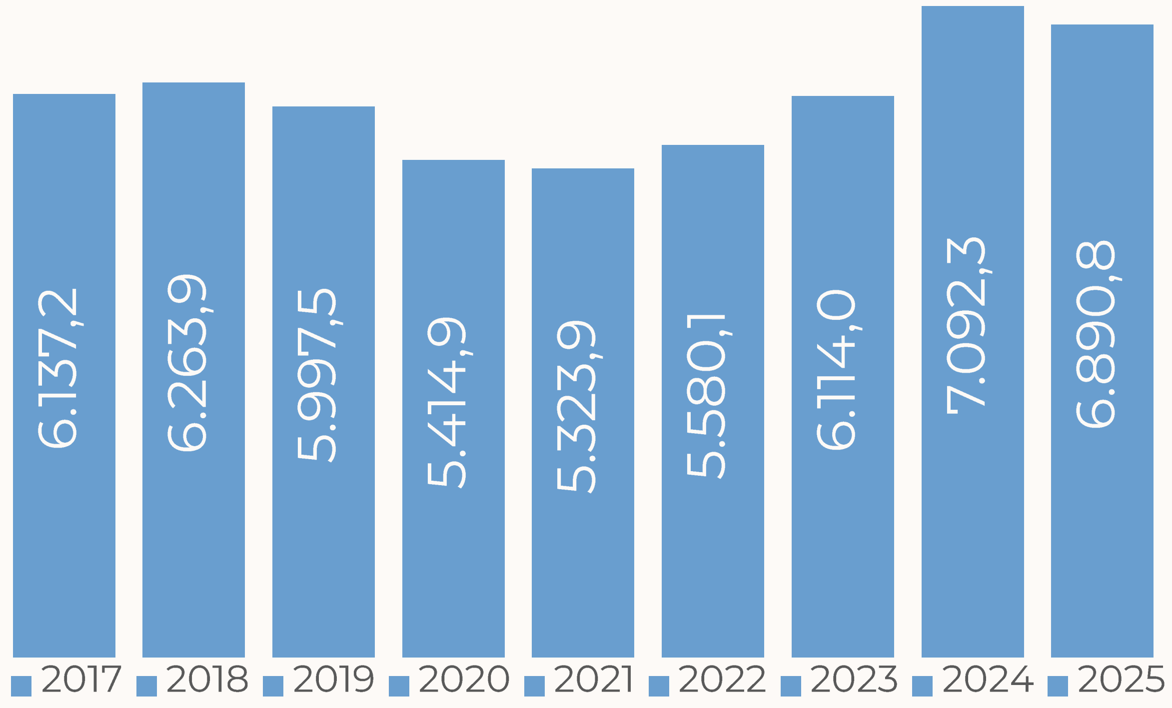


CAGR (2018- 2025): 3,1%

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)

-2,3%
(2025-2024)



CAGR (2018-2025): 1,8%

In 2025, after the post-pandemic recovery, there was a slight deceleration in the labor market, with a reduction of 2.3% compared to 2024. Still, opportunities remained high, totaling around 6.9 million, indicating accommodation after the recent peak, but at a historically relevant level.

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:

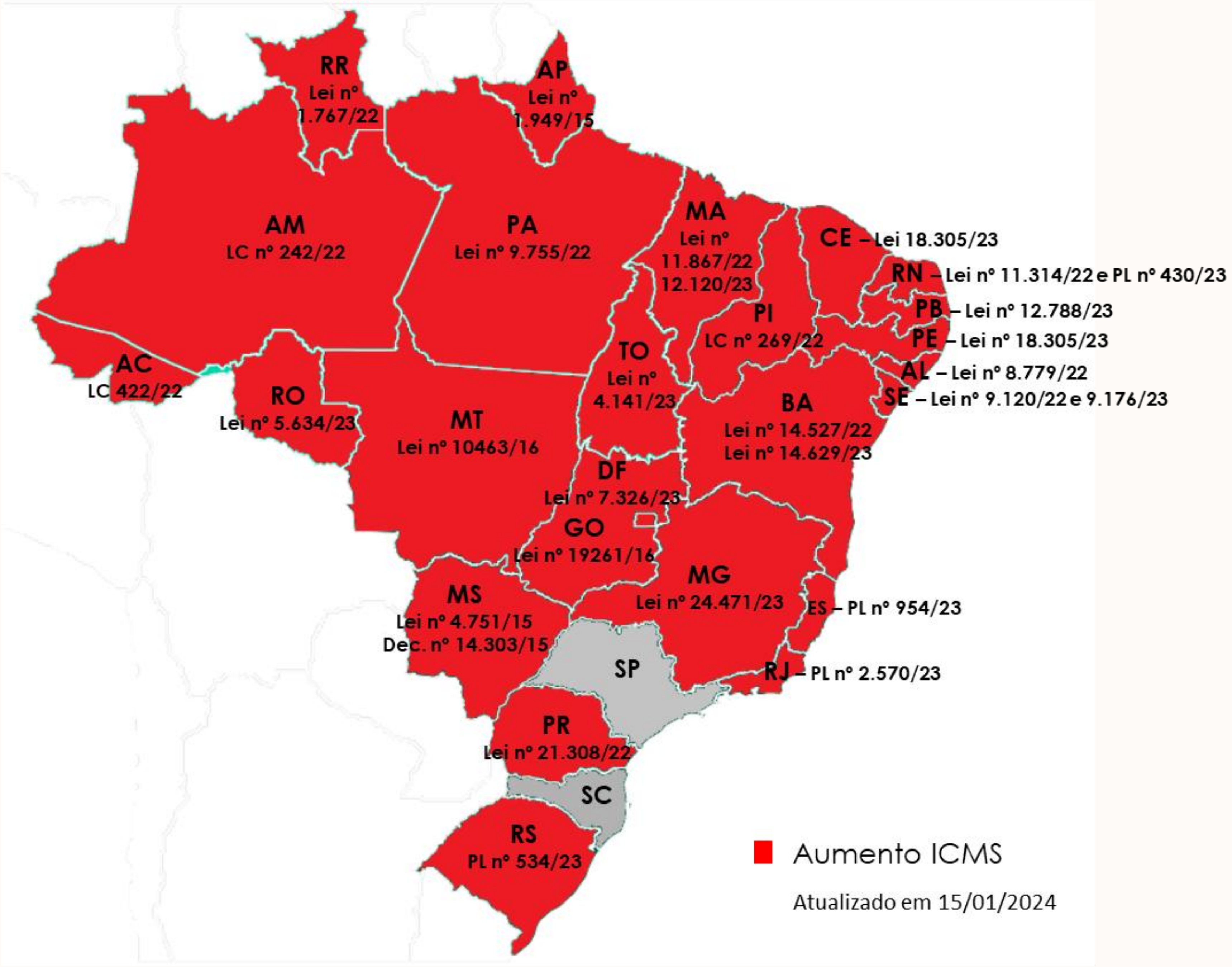
	PRODUCTION (R$)	OCUPATION (Units, for 1 year)	TAXES (R$)	WAGES (R$)
CT&F	1,3 billion	25 Thousand	591 Million	509 Million

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

	PRODUCTION (R$)	OCUPATION (Units, for 1 year)	TAXES (R$)	WAGES (R$)
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 2016-2025

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

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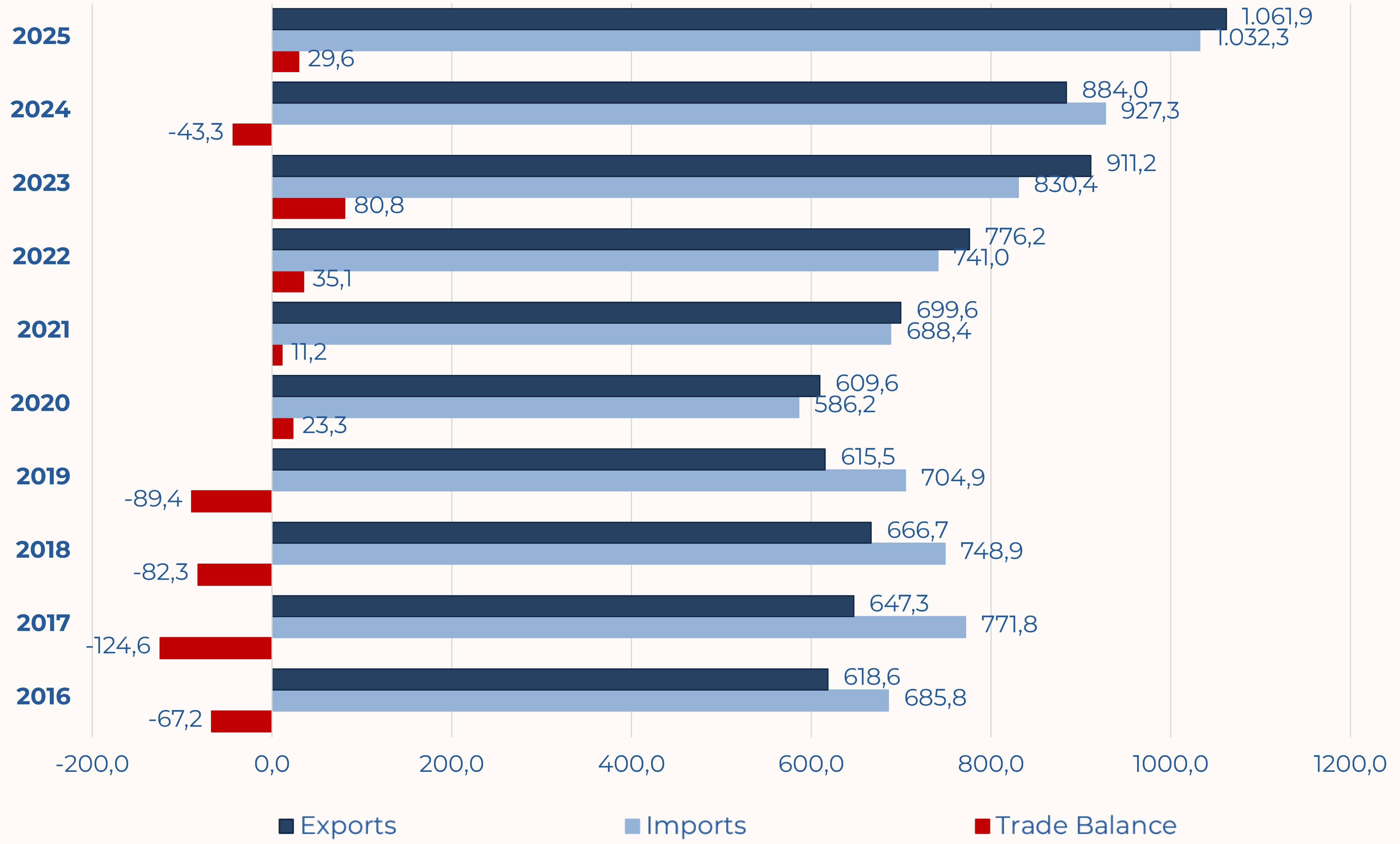

Source: ComexStat/MDIC-SECEX

Trade Balance January–June 2017–2026
Brazilian Exports and Imports of CT&F (Amounts in US$ million - FOB)

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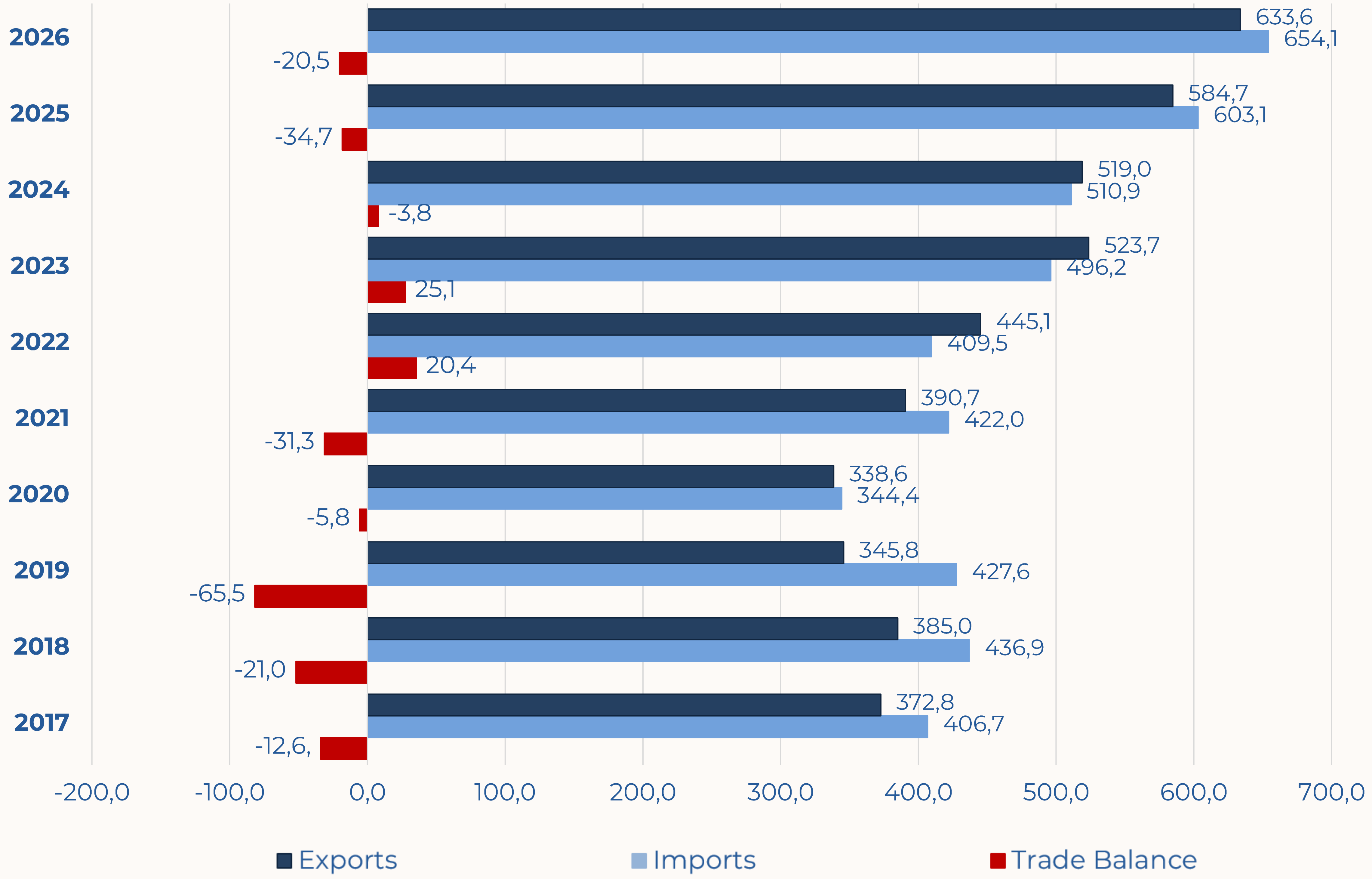

Fonte: ComexStat/MDIC-SECEX

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

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		FOB Value: US$ Million				Volume One Thousand Tons			
Rk	País	2025	2026	Var (%)	Part (%) 2026	2025	2026	Var (%)	Part (%) 2026
1	Argentina	115,4	141,7	22,8%	22,4%	31,2	41,0	31,4%	23,6%
2	Colombia	53,6	66,1	23,5%	10,4%	10,6	13,2	25,0%	7,6%
3	Mexico	69,0	63,3	-8,2%	10,0%	12,0	9,7	-18,9%	5,6%
4	Chile	57,6	61,4	6,6%	9,7%	14,9	14,4	-3,2%	8,3%
5	Paraguay	45,4	55,1	21,3%	8,7%	30,4	31,7	4,3%	18,2%
6	Peru	31,1	35,8	14,9%	5,6%	6,9	7,3	6,1%	4,2%
7	Uruguay	29,0	33,6	15,6%	5,3%	21,7	22,2	2,5%	12,8%
8	Portugal	24,4	22,3	-8,7%	3,5%	4,4	3,9	-11,6%	2,2%
9	Ecuador	12,0	19,4	61,9%	3,1%	2,3	4,0	70,1%	2,3%
10	United States	41,7	18,9	-54,6%	3,0%	13,2	3,4	-74,5%	1,9%
11	Netherlands	3,6	14,5	300,4%	2,3%	0,7	1,4	109,9%	0,8%
12	Bolivia	11,8	14,3	21,1%	2,3%	5,3	5,3	1,3%	3,1%
13	Panama	10,2	7,8	-23,3%	1,2%	4,5	2,9	-35,5%	1,7%
14	Venezuela	7,3	7,1	-2,6%	1,1%	3,8	3,1	-18,3%	1,8%
15	India	5,6	5,4	-3,1%	0,9%	0,4	0,5	22,6%	0,3%
	Top 15	**517,6**	**566,7**	**9,5%**	**89,4%**	**162,2**	**164,1**	**1,2%**	**94,3%**
	Grand Total	**584,7**	**633,6**	**8,4%**	**100,0%**	**174,0**	**174,0**	**0,0%**	**100,0%**

Source: ComexStat/MDIC-SECEX

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

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		FOB Value: US$ Million				Volume One Thousand Tons			
Rk	País	2025	2026	Var (%)	Part (%) 2026	2025	2026	Var (%)	Part (%) 2026
1	China	120,0	158,8	32,4%	24,3%	35,2	50,4	43,2%	57,2%
2	France	119,0	116,9	-1,7%	17,9%	4,2	4,2	0,0%	4,7%
3	Spain	61,9	63,6	2,8%	9,7%	3,3	2,6	-18,7%	3,0%
4	United States	41,8	41,0	-1,8%	6,3%	3,0	2,7	-8,1%	3,1%
5	Italy	27,2	34,6	27,5%	5,3%	0,8	0,9	17,6%	1,0%
6	South Korea	19,3	29,4	52,8%	4,5%	1,0	1,6	56,9%	1,8%
7	Mexico	32,8	27,0	-17,8%	4,1%	5,0	3,0	-40,5%	3,4%
8	Germany	16,8	23,9	42,2%	3,7%	2,7	3,0	9,9%	3,4%
9	India	15,7	19,4	23,3%	3,0%	2,2	2,3	5,6%	2,6%
10	Switzerland	18,3	15,0	-17,9%	2,3%	0,2	0,2	-24,1%	0,2%
11	Poland	15,1	14,6	-3,1%	2,2%	1,9	1,6	-17,0%	1,8%
12	Colombia	14,6	14,4	-1,6%	2,2%	4,8	4,7	-2,4%	5,3%
13	Argentina	16,8	10,7	-36,5%	1,6%	1,9	1,5	-21,2%	1,7%
14	United Arab Emirates	6,1	9,6	56,9%	1,5%	0,6	0,8	31,9%	0,9%
15	Japan	6,0	7,1	17,6%	1,1%	0,5	0,6	29,6%	0,7%
	Top 15	**531,4**	**586,2**	**10,3%**	**89,6%**	**67,1**	**80,0**	**19,1%**	**90,8%**
	Grand Total	**603,1**	**654,1**	**8,5%**	**100,0%**	**75,5**	**88,1**	**16,7%**	**100,0%**

Source: ComexStat/MDIC-SECEX

Sector Repositioning Campaign

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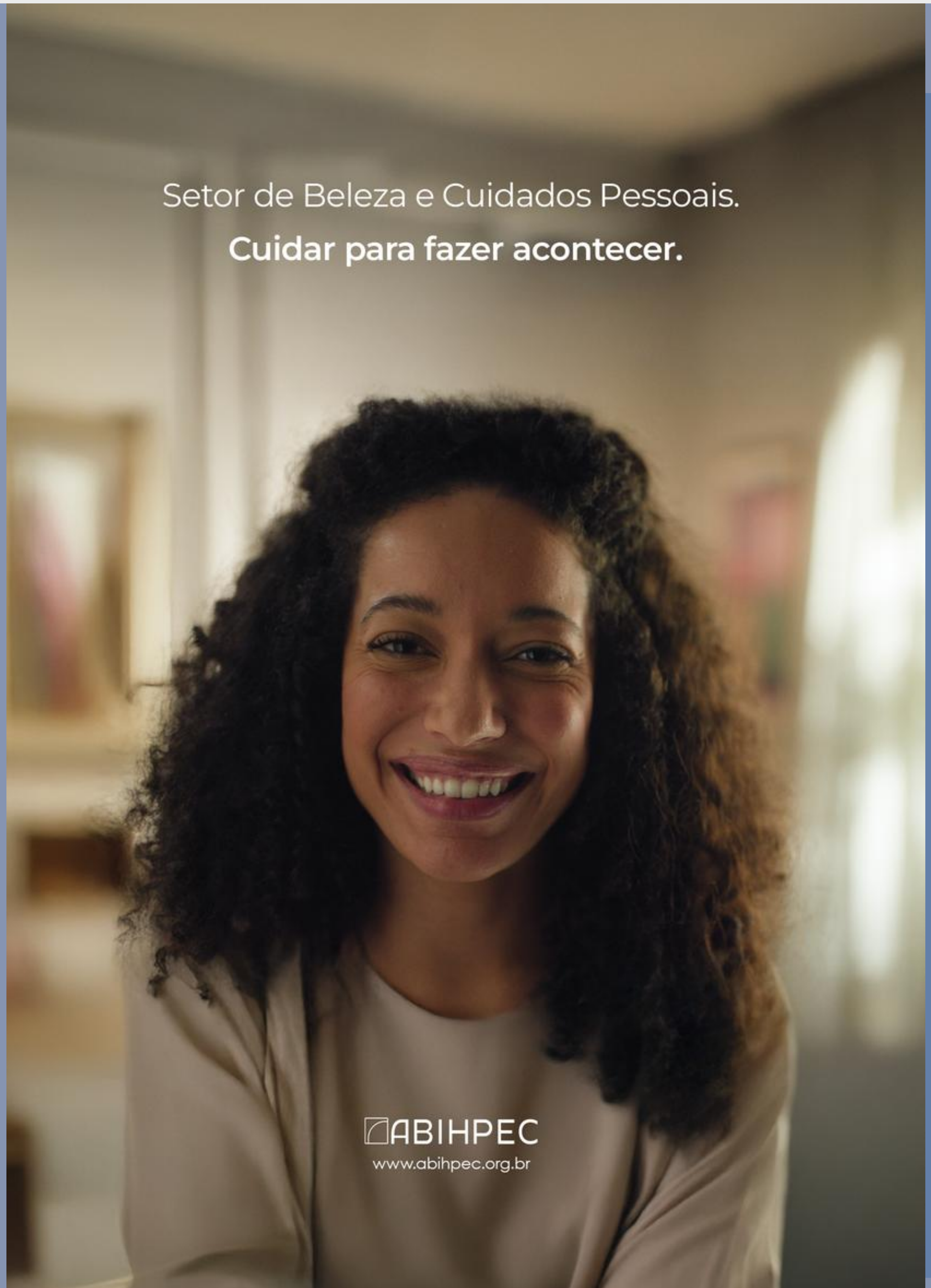

Beauty & Personal Care Sector. Care to make it happen.

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

Watch the full movie:

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