



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

Total US\$ 640 billion

Brazil in the World

Sales to consumer 2024 – Global CT&F Market

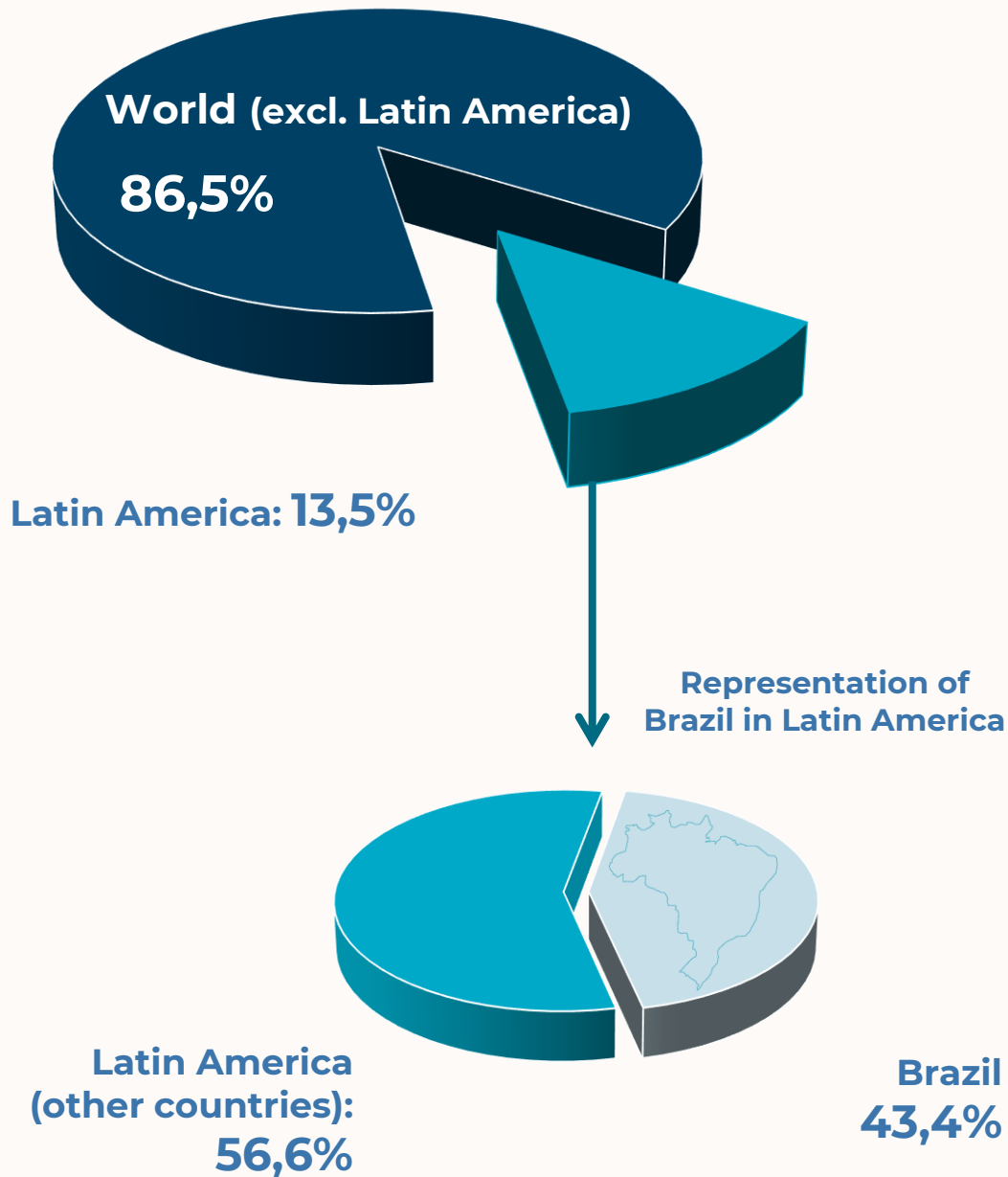
TOP 10
CONSUMER MARKETS

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

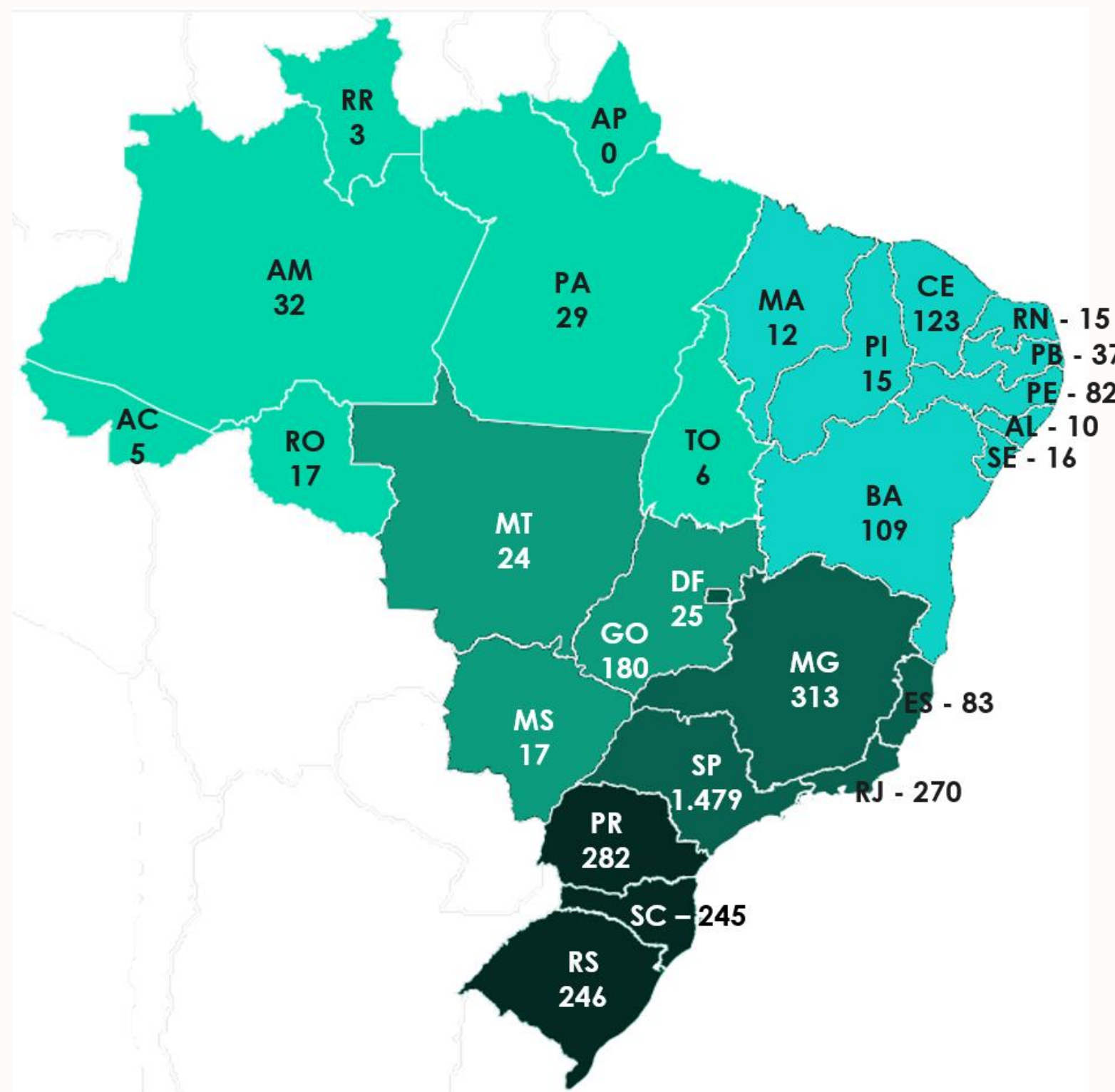


Source: Euromonitor 2024

An Entrepreneur Sector: CT&F companies in Brazil

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

Updated: 10-22-2025



Generates around 6.9 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.



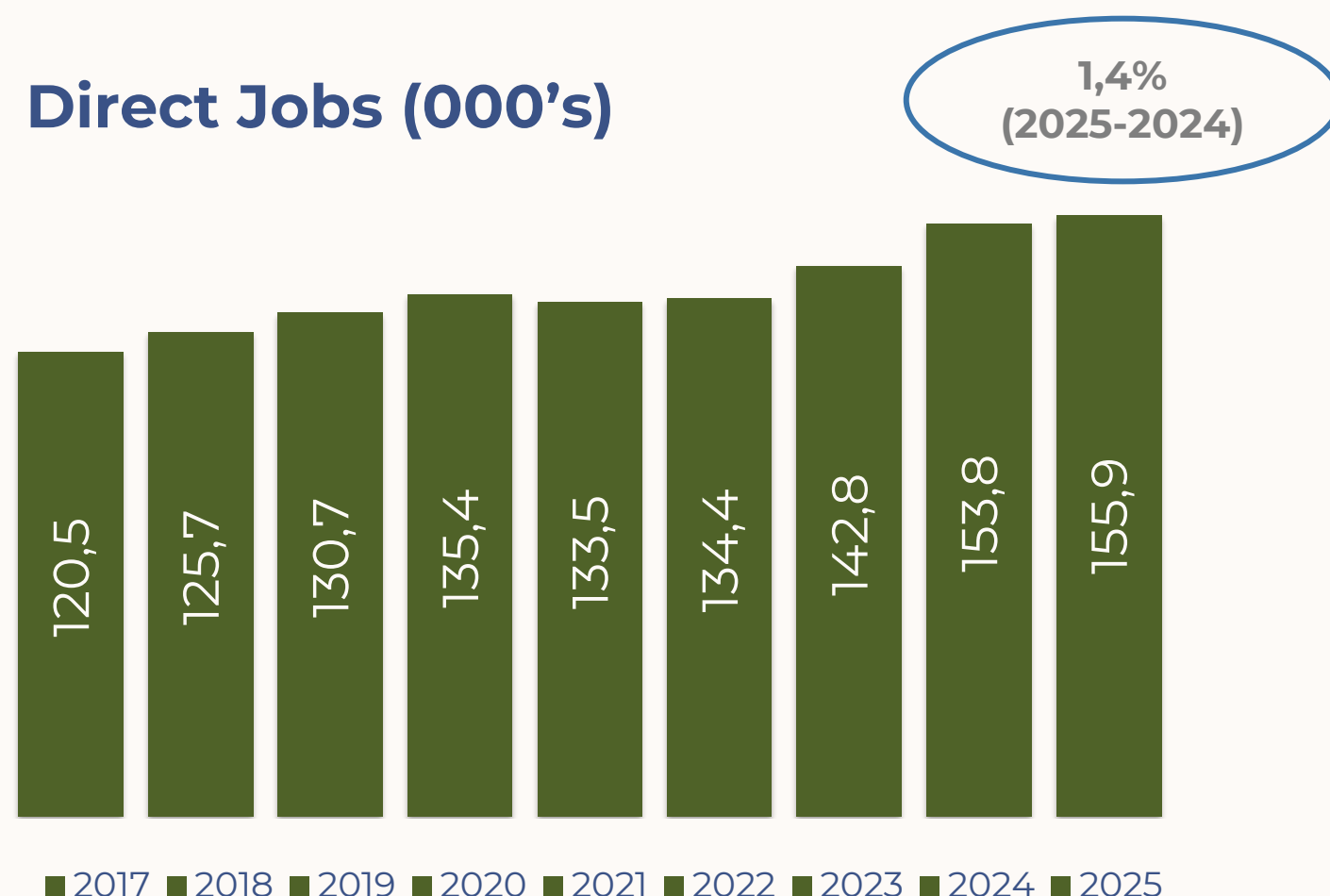
Work opportunities per channel

WORK OPPORTUNITIES ('000)											
	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	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)



■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025

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)



■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024 ■ 2025

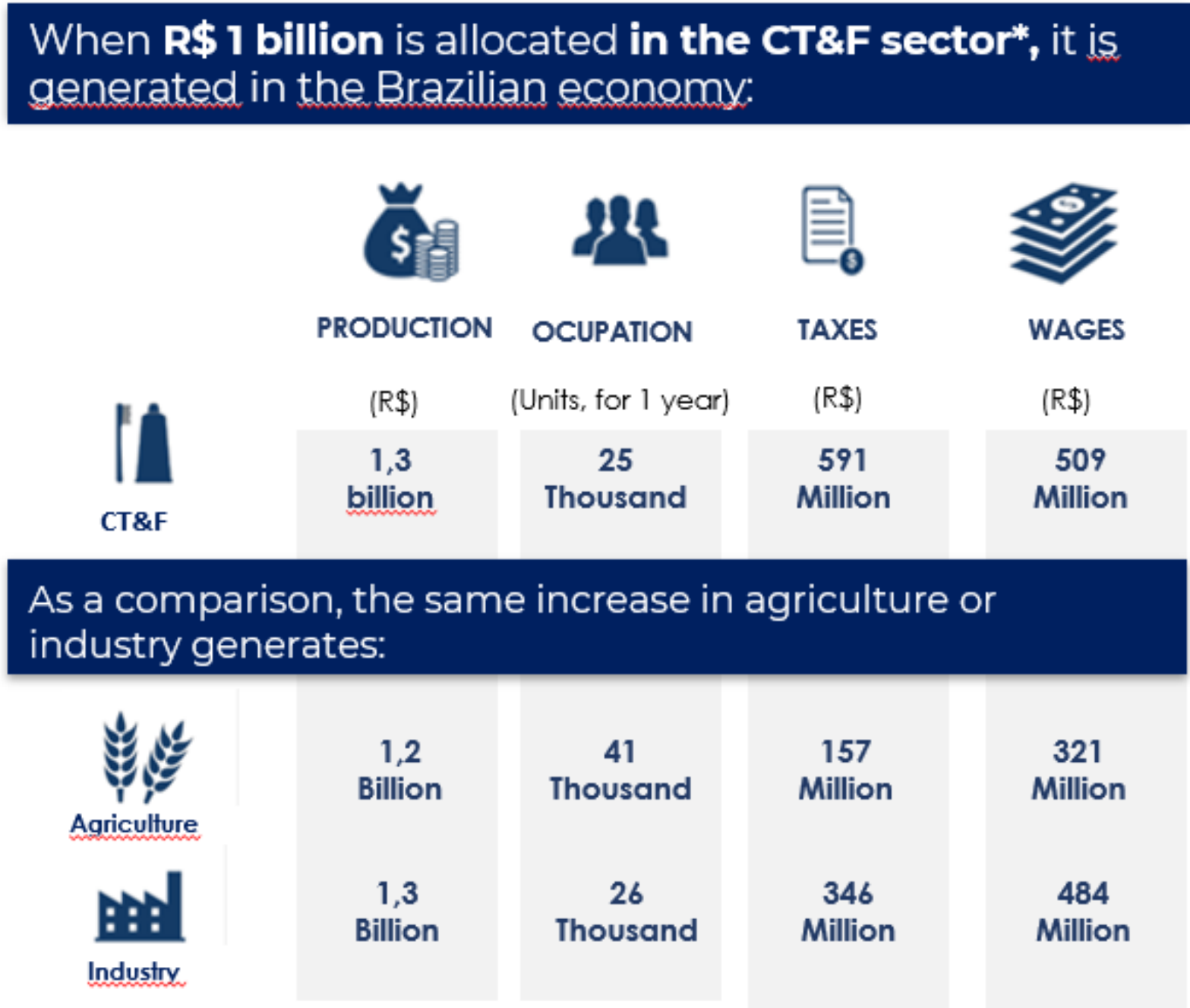
CAGR (2018-2025): 1,8%

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

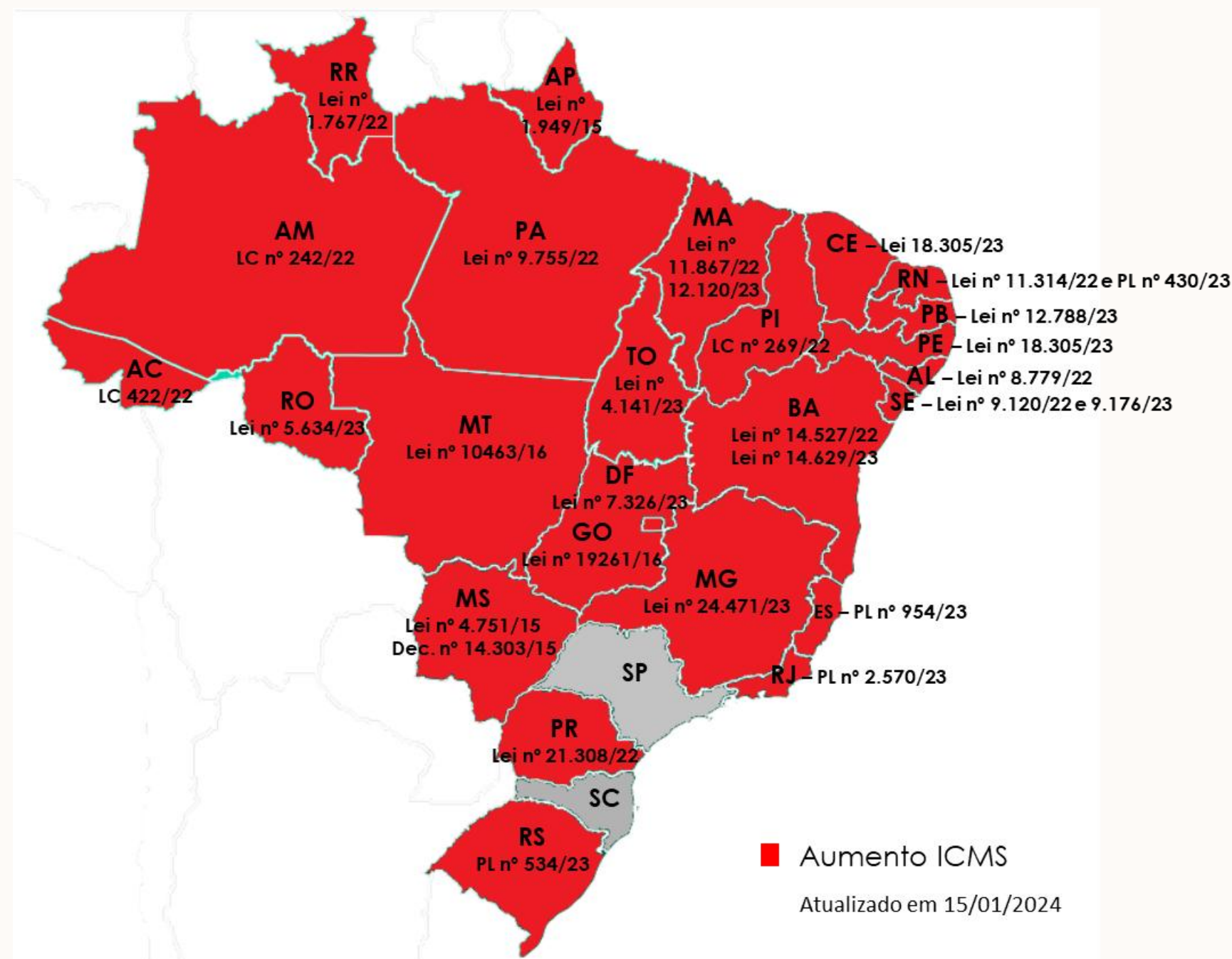
The matrix effect shows the relevance of a sector along the production chain:

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



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.

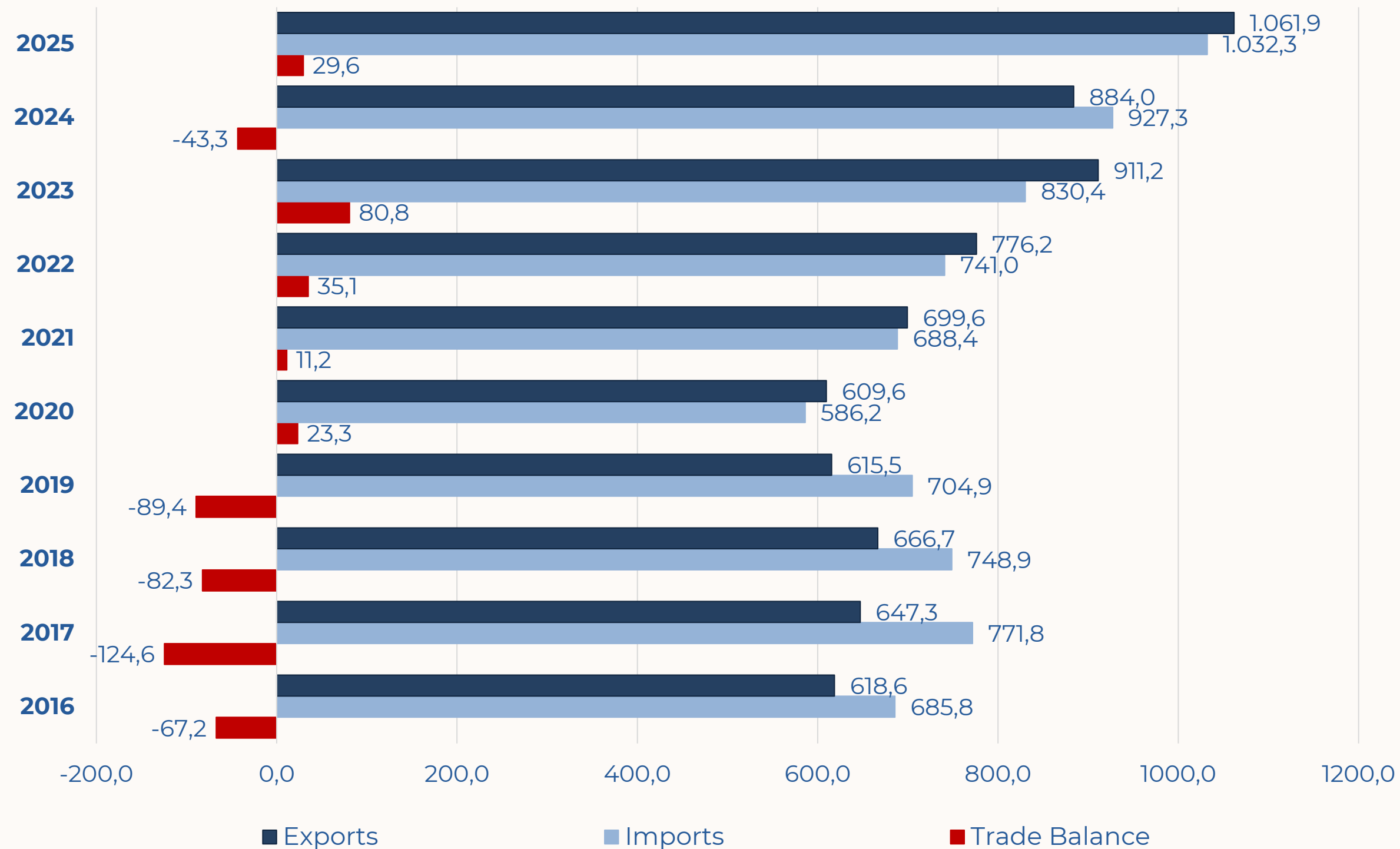
The sector was penalized with an increase in ICMS in 24 states and the Federal District, according to the map, in addition to the strong impact caused by the shift of the IPI from the industry to the distributor that occurred in 2015.

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

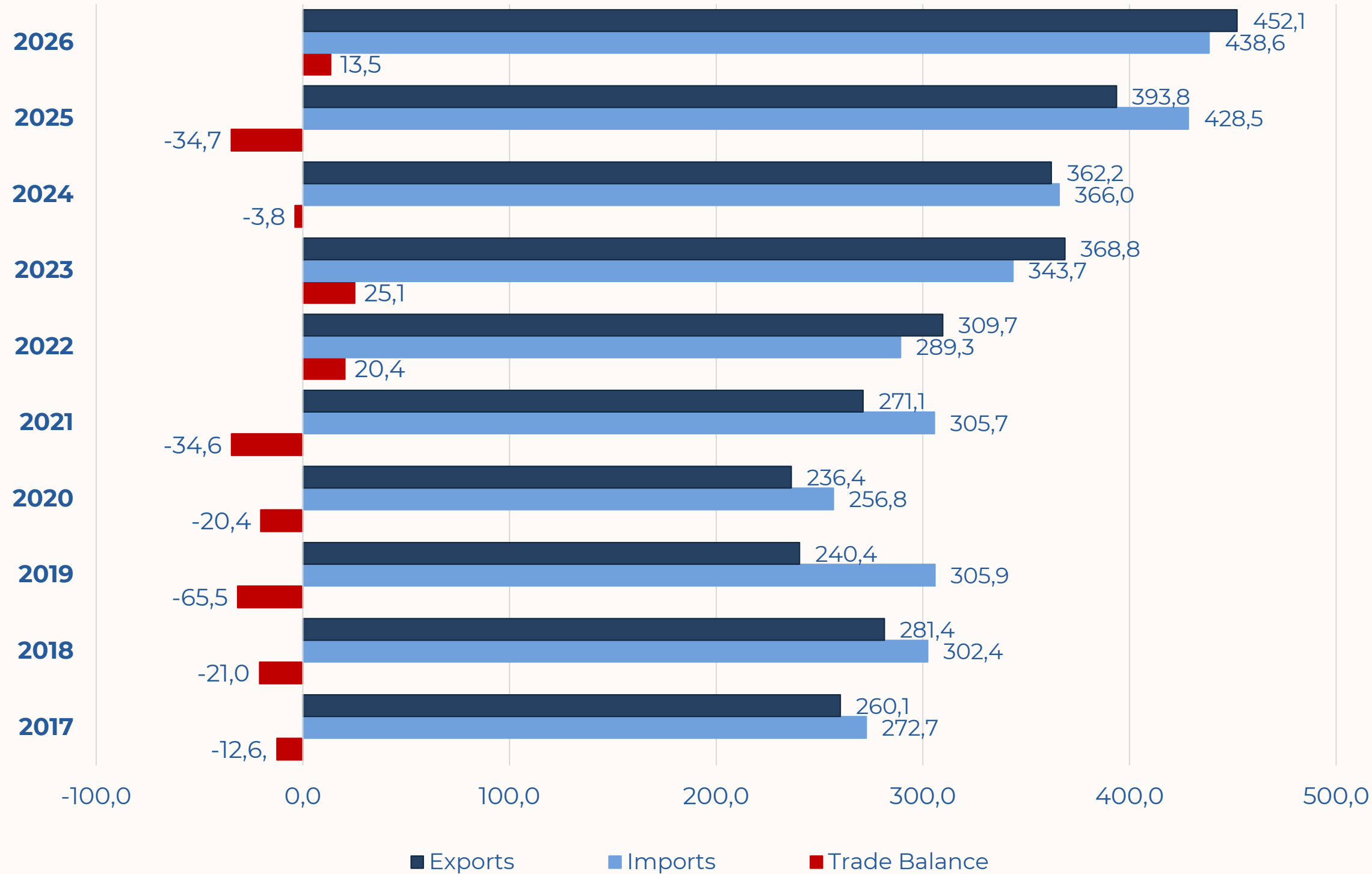
Brazilian Exports and Imports of CT&F (Amounts in US\$ million - FOB)



Source: ComexStat/MDIC-SECEX

Trade Balance January–May 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–May 2025/2026



Rk	País	FOB Value: US\$ Million				Volume One Thousand Tons			
		2025	2026	Var (%)	Part (%) 2026	2025	2026	Var (%)	Part (%) 2026
1	Argentina	72,1	100,7	39,6%	22,3%	19,5	30,1	54,1%	24,3%
2	Colombia	40,2	47,9	19,3%	10,6%	8,0	9,4	16,8%	7,6%
3	Chile	40,1	46,1	15,0%	10,2%	10,5	10,8	3,0%	8,7%
4	Mexico	46,5	45,6	-1,9%	10,1%	8,4	7,1	-15,5%	5,8%
5	Paraguay	30,6	37,5	22,5%	8,3%	20,7	21,1	1,9%	17,1%
6	Peru	22,1	24,0	8,5%	5,3%	4,9	4,9	-0,1%	3,9%
7	Uruguay	19,8	23,8	20,6%	5,3%	14,8	15,7	6,3%	12,7%
8	Portugal	19,0	19,8	4,0%	4,4%	3,3	3,5	8,0%	2,9%
9	United States	23,6	13,1	-44,4%	2,9%	7,4	2,4	-67,5%	2,0%
10	Ecuador	8,3	12,1	45,2%	2,7%	1,6	2,4	52,2%	2,0%
11	Netherlands	2,2	10,6	387,1%	2,4%	0,4	1,1	166,9%	0,9%
12	Bolivia	7,6	9,7	26,6%	2,1%	3,5	3,6	3,0%	2,9%
13	Panama	6,0	4,8	-20,3%	1,1%	2,6	1,7	-33,9%	1,4%
14	Venezuela	5,2	4,6	-11,3%	1,0%	2,6	1,9	-28,2%	1,5%
15	Guatemala	3,1	3,8	23,7%	0,8%	0,9	0,9	-2,8%	0,7%
Top 15		346,6	404,3	16,7%	89,4%	109,2	116,6	6,8%	94,4%
Grand Total		393,8	452,1	14,8%	100,0%	117,0	123,5	5,6%	100,0%

Source: ComexStat/MDIC-SECEX

Brazilian CT&F Imports – TOP 15

By Country – January-May 2025/2026



Rk	País	FOB Value: US\$ Million				Volume One Thousand Tons			
		2025	2026	Var (%)	Part (%) 2026	2025	2026	Var (%)	Part (%) 2026
1	China	85,6	103,8	21,3%	23,7%	24,7	32,7	32,7%	56,6%
2	France	88,0	82,4	-6,3%	18,8%	3,2	2,9	-10,7%	5,0%
3	Spain	43,4	41,9	-3,3%	9,6%	2,3	1,8	-22,4%	3,1%
4	United States	28,9	28,2	-2,4%	6,4%	2,3	1,8	-19,0%	3,2%
5	Italy	18,5	23,0	24,7%	5,2%	0,5	0,6	11,4%	1,0%
6	South Korea	14,0	18,7	34,0%	4,3%	0,7	1,1	59,1%	1,8%
7	Mexico	24,1	18,1	-25,2%	4,1%	3,6	1,9	-46,7%	3,3%
8	Germany	12,1	16,6	37,0%	3,8%	2,0	2,1	2,6%	3,6%
9	India	10,6	14,4	35,6%	3,3%	1,5	1,6	7,3%	2,8%
10	Switzerland	11,1	10,5	-5,5%	2,4%	0,2	0,1	-11,5%	0,2%
11	Poland	10,7	9,7	-9,4%	2,2%	1,4	1,1	-22,4%	1,9%
12	Colombia	10,6	9,7	-8,9%	2,2%	3,6	3,2	-9,7%	5,6%
13	Argentina	12,8	6,9	-45,9%	1,6%	1,6	0,8	-50,9%	1,3%
14	United Arab Emirates	5,1	5,7	11,0%	1,3%	0,5	0,5	-6,0%	0,9%
15	Thailand	8,4	5,2	-38,6%	1,2%	0,4	0,3	-17,6%	0,6%
Top 15		384,0	394,8	2,8%	90,0%	48,4	52,6	8,6%	90,9%
Grand Total		428,5	438,6	2,4%	100,0%	54,2	57,8	6,7%	100,0%

Source: ComexStat/MDIC-SECEX



Sector Repositioning Campaign



Setor de Beleza e Cuidados Pessoais.
Cuidar para fazer acontecer.



 ABIHPEC
www.abihpec.org.br

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:



comunicacao@abihpec.org.br

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

www.abihpec.org.br