



MEDICAL DEVICES



PHARMACEUTICALS



CHEMICALS



FOOD & BEVERAGE



ELECTRONICS

## **Analysis of the Personal Care Chemicals Market**

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**VENTURE PLANNING GROUP** 545 Eighth Avenue, Suite 401 New York, NY 10018  
Phone + 1 212 564 2838 Fax + 1 212 564 8133 [info@vpgcorp.com](mailto:info@vpgcorp.com)

F R O S T & S U L L I V A N



Market  
Engineering

# Analysis of the Personal Care Chemicals Market

## Strategic Opportunities for Innovation

**Brazil**

**March 2012**

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# Market Overview—Key Questions This Study Will Answer

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Is the personal care chemicals market growing, how long will it continue to grow, and at what rate?

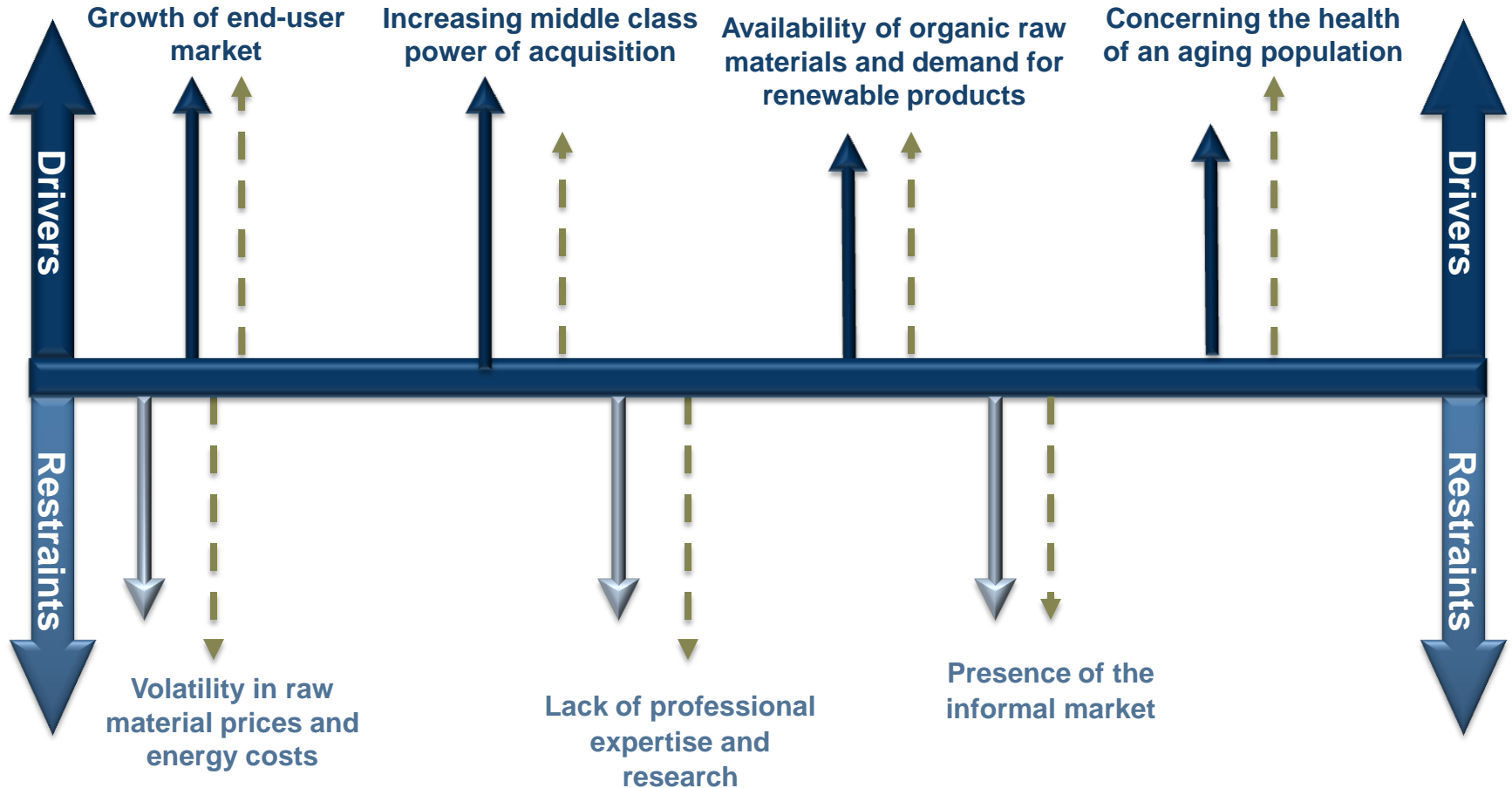
What are the current and future market trends? Are the existing competitors structured correctly to meet customer needs?

Will these companies and products continue to exist or will they get acquired by other companies?  
Will the products become features in other markets?

Are the products offered today meeting customer needs, or is additional development needed?

# Drivers and Restraints

**Key Takeaway: Increasing consumption of personal care products is expected to be the main market drive, while the volatility of raw material and energy cost is expected to be the main restraint.**



—▶ Denotes current impact  
- -▶ Denotes long-term impact

# Drivers—Impact and Duration

Driver	1-2 Years	3-4 Years	5-7 Years
Growth of end-user market	x	H	x
Increasing middle class and its power of acquisition	H	x	x
Availability of organic raw materials and demand for renewable products	x	M	x
Concerning the health of an aging population	x	x	H

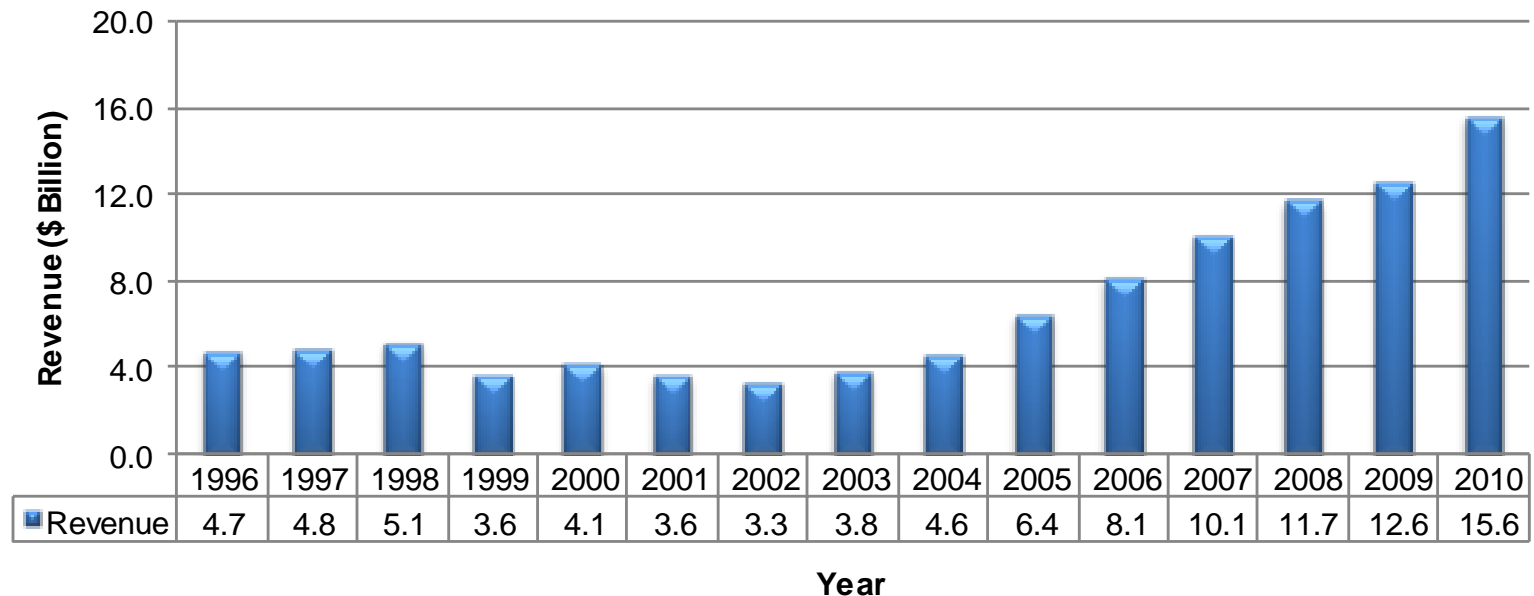
**Impact Ratings: H = High, M = Medium, L = Low**

# Drivers Explained

## Growth of End-user Market

- The Brazilian personal care market had high growth rates (an average of xx.x percent) during the past 15 years. This market is expected to grow to xx.x percent in 2011.
- Brazil is the third-largest market for personal care products in the world. It is the leading market for deodorants and fragrances, and the second-largest for sunscreen products.

**Personal Care Market: Revenue Growth, Brazil, 1996-2010**



# Drivers Explained (continued)

## Increasing Middle Class and Its Power of Acquisition

From 2009 to 2011, about xx million people joined at the “new middle class”, otherwise known as C class. Currently, these people account for more than xx percent of the total population in Brazil. In 2010, about xx percent of the personal care market’s total revenue came from the “new middle class”. For the next several years, similar growth is expected.

**Social Classes Distribution, Brazil, 2004, 2009 and 2015**

