



Beauty and Personal Care in Ecuador

April 2024

Table of Contents

Beauty and Personal Care in Ecuador

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2018-2023

Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023

Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2018-2023

Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Chinese brands make a bid to improve their positions and increase their influence

Angelino records an outstanding performance thanks to its launch of new products

Schools increasingly ask parents to supply sun care products for their children

PROSPECTS AND OPPORTUNITIES

Low investment in marketing set to place limits on the extent to which sales can grow

Sales under pressure as various challenging factors undermine sales growth

Parents increasingly looking for skin care properties in products for their children

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2018-2023

Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023

Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023

Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023

Table 16 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

Table 17 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

Table 18 - Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028

Table 19 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

Table 20 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

Bath and Shower in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bath and shower falters as rigorous handwashing falls by the wayside
Demand for intimate washes down despite recommendations from gynaecologists
Antibacterial properties less important than fragrance and skin care properties

PROSPECTS AND OPPORTUNITIES

Adverse economic outlook to impact sales of bath additives, shower gel, liquid soap
Specific deodorants and talc for feet set to gain ground against body powder
Confusing formats set to make it harder for consumers to make decisions

CATEGORY DATA

Table 21 - Sales of Bath and Shower by Category: Value 2018-2023
Table 22 - Sales of Bath and Shower by Category: % Value Growth 2018-2023
Table 23 - Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023
Table 24 - NBO Company Shares of Bath and Shower: % Value 2019-2023
Table 25 - LBN Brand Shares of Bath and Shower: % Value 2020-2023
Table 26 - LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023
Table 27 - Forecast Sales of Bath and Shower by Category: Value 2023-2028
Table 28 - Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028
Table 29 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

Colour Cosmetics in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Goodbye to face masks, welcome back to colour cosmetics
L'Oréal generating growing sales after its return to Ecuador
Incorporating skin care elements is a new focus for colour cosmetics brands

PROSPECTS AND OPPORTUNITIES

Recently imposed night curfews place limits on nocturnal social interactions
Recovery in the supply of colour cosmetics to support sales growth
Social Media set to become increasingly important for promoting colour cosmetics

CATEGORY DATA

Table 30 - Sales of Colour Cosmetics by Category: Value 2018-2023
Table 31 - Sales of Colour Cosmetics by Category: % Value Growth 2018-2023
Table 32 - Sales of Colour Cosmetics by Premium vs Mass: % Value 2018-2023
Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2019-2023
Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2020-2023
Table 35 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023
Table 36 - Forecast Sales of Colour Cosmetics by Category: Value 2023-2028
Table 37 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028
Table 38 - Forecast Sales of Colour Cosmetics by Premium vs Mass: % Value 2023-2028

Deodorants in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Deodorant creams in tubes appeal to budget-conscious consumers
Anti-perspirant deodorants gain traction as consumers demand better performance
Added value and efficiency of deodorants increasingly appealing to consumers

PROSPECTS AND OPPORTUNITIES

Expanding ranges to include child-specific deodorants presents new opportunities
Skin care properties set to become increasingly important in deodorants
Discounters and private label set to gaining ground during the forecast period

CATEGORY DATA

Table 39 - Sales of Deodorants by Category: Value 2018-2023
Table 40 - Sales of Deodorants by Category: % Value Growth 2018-2023
Table 41 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023
Table 42 - NBO Company Shares of Deodorants: % Value 2019-2023
Table 43 - LBN Brand Shares of Deodorants: % Value 2020-2023
Table 44 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023
Table 45 - Forecast Sales of Deodorants by Category: Value 2023-2028
Table 46 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028
Table 47 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Veet launches a new formula in response to declining volume sales in 2023
New products appear that are designed to cater to specific consumer needs
Women use standard razors and blades to avoid the so-called "pink tax"

PROSPECTS AND OPPORTUNITIES

Laser depilation set become a stronger challenger to sales of depilatories
Sustainability and eco-friendly proposals to become more appealing to consumers
Innovation in formulation and natural products

CATEGORY DATA

Table 48 - Sales of Depilatories by Category: Value 2018-2023
Table 49 - Sales of Depilatories by Category: % Value Growth 2018-2023
Table 50 - NBO Company Shares of Depilatories: % Value 2019-2023
Table 51 - LBN Brand Shares of Depilatories: % Value 2020-2023
Table 52 - Forecast Sales of Depilatories by Category: Value 2023-2028
Table 53 - Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

Fragrances in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dominant distribution channel direct selling continues to recover from the pandemic
Yanbal stands out due to huge investment in marketing and product development
Contraband, counterfeits and imitations challenge official retail sales of fragrances

PROSPECTS AND OPPORTUNITIES

Unisex fragrances to become more attractive during the forecast period
Cross-border e-commerce expected to continue gaining traction
Removal of import tariffs from EU imports to benefit premium fragrances

CATEGORY DATA

Table 54 - Sales of Fragrances by Category: Value 2018-2023

Table 55 - Sales of Fragrances by Category: % Value Growth 2018-2023

Table 56 - NBO Company Shares of Fragrances: % Value 2019-2023

Table 57 - LBN Brand Shares of Fragrances: % Value 2020-2023

Table 58 - LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023

Table 59 - LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

Table 60 - Forecast Sales of Fragrances by Category: Value 2023-2028

Table 61 - Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

Hair Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers looking for improved efficacy turn to specialist products

Styling gel loses ground against other styling agents

L'Oréal's full hair care portfolio available once again to local consumers

PROSPECTS AND OPPORTUNITIES

Thriving competitive landscape to become more intense during the forecast period

Hard discounters to become a more relevant distribution channel in hair care

Players bet on natural ingredients and clean labels to appeal to customers

CATEGORY DATA

Table 62 - Sales of Hair Care by Category: Value 2018-2023

Table 63 - Sales of Hair Care by Category: % Value Growth 2018-2023

Table 64 - Sales of Hair Care by Premium vs Mass: % Value 2018-2023

Table 65 - NBO Company Shares of Hair Care: % Value 2019-2023

Table 66 - LBN Brand Shares of Hair Care: % Value 2020-2023

Table 67 - NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023

Table 68 - LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023

Table 69 - LBN Brand Shares of Premium Hair Care: % Value 2020-2023

Table 70 - Forecast Sales of Hair Care by Category: Value 2023-2028

Table 71 - Forecast Sales of Hair Care by Category: % Value Growth 2023-2028

Table 72 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Beard care and grooming a major trend supporting demand for men's shaving

Men's skin care gains ground as more men want to protect and nourish their skin

Styling gel loses ground to styling creams and modelling waxes in men's hair care

PROSPECTS AND OPPORTUNITIES

Increase in numbers of men acting as direct selling agents presents opportunities

Barbershop culture set to remain highly influential on men's grooming

Affordability a key factor set to underpin sales growth during the forecast period

CATEGORY DATA

Table 73 - Sales of Men's Grooming by Category: Value 2018-2023

Table 74 - Sales of Men's Grooming by Category: % Value Growth 2018-2023

Table 75 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023

Table 76 - Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023

- Table 77 - NBO Company Shares of Men's Grooming: % Value 2019-2023
- Table 78 - LBN Brand Shares of Men's Grooming: % Value 2020-2023
- Table 79 - LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023
- Table 80 - Forecast Sales of Men's Grooming by Category: Value 2023-2028
- Table 81 - Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

Oral Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Brands that represent good value the big winners as volume growth turns positive
- Fortident's sales decrease presents opportunities to smaller players
- More specialised oral care brands benefit from more recommendations from dentists

PROSPECTS AND OPPORTUNITIES

- Hard discounters set to spur growth in sales of less expensive oral care products
- Power toothbrushes to maintain significant growth potential despite high prices
- Denture care set to benefit from the ageing of the Ecuadorian population

CATEGORY DATA

- Table 82 - Sales of Oral Care by Category: Value 2018-2023
- Table 83 - Sales of Oral Care by Category: % Value Growth 2018-2023
- Table 84 - Sales of Toothbrushes by Category: Value 2018-2023
- Table 85 - Sales of Toothbrushes by Category: % Value Growth 2018-2023
- Table 86 - Sales of Toothpaste by Type: % Value Breakdown 2019-2023
- Table 87 - NBO Company Shares of Oral Care: % Value 2019-2023
- Table 88 - LBN Brand Shares of Oral Care: % Value 2020-2023
- Table 89 - Forecast Sales of Oral Care by Category: Value 2023-2028
- Table 90 - Forecast Sales of Oral Care by Category: % Value Growth 2023-2028
- Table 91 - Forecast Sales of Toothbrushes by Category: Value 2023-2028
- Table 92 - Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Steady sales growth of Facial Care in Ecuador
- L'Oréal's revival in Ecuador underpins a revival for premium skin care overall
- Dermocosmetics and "lookalike" dermo brands outperform mass brands in facial care

PROSPECTS AND OPPORTUNITIES

- The rise of hard discounters expected to bring new dynamism to mass skin care
- Ingredient-led products set to gain ground in skin care during the forecast period
- The appeal of skin care starts to spread among younger consumers

CATEGORY DATA

- Table 93 - Sales of Skin Care by Category: Value 2018-2023
- Table 94 - Sales of Skin Care by Category: % Value Growth 2018-2023
- Table 95 - NBO Company Shares of Skin Care: % Value 2019-2023
- Table 96 - LBN Brand Shares of Skin Care: % Value 2020-2023
- Table 97 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023
- Table 98 - Forecast Sales of Skin Care by Category: Value 2023-2028

Table 99 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales growth in sun care driven by higher awareness of the dangers of the sun
Dermocosmetics and value-added features key to stronger value growth in sun care
Brands invest in point-of-sale initiatives in an effort to boost sales growth

PROSPECTS AND OPPORTUNITIES

Ecuador's high solar radiation set to boost the attractiveness of sun care
Visits to educational institutions to raise awareness of the need to use sun care
Offering sun care for different skin tones a key strategy to reach more consumers

CATEGORY DATA

Table 100 - Sales of Sun Care by Category: Value 2018-2023
Table 101 - Sales of Sun Care by Category: % Value Growth 2018-2023
Table 102 - Sales of Sun Care by Premium vs Mass: % Value 2018-2023
Table 103 - NBO Company Shares of Sun Care: % Value 2019-2023
Table 104 - LBN Brand Shares of Sun Care: % Value 2020-2023
Table 105 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023
Table 106 - Forecast Sales of Sun Care by Category: Value 2023-2028
Table 107 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

L'Oréal drives the growth of premium beauty and personal care
Cross-border e-commerce becomes a substitute for shopping in local stores
Salon Professional Hair Care drives the growth of Premium Hair Care

PROSPECTS AND OPPORTUNITIES

Adverse economic scenario and tight budgets to limit demand for premium brands
Contraband, parallel imports and imitations to undermine official sales of premium brands
Free trade agreement with the EU promises tariff-free trade in beauty and personal care

CATEGORY DATA

Table 108 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023
Table 109 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023
Table 110 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023
Table 111 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023
Table 112 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028
Table 113 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in Ecuador

KEY DATA FINDINGS

2023 DEVELOPMENTS

Yanbal's robust approach to expansion pushes the recovery of direct selling
Hard discounters, private label attract the attention of consumers with tight budgets

Dermocosmetics and dermocosmetic lookalikes outperform mass brands

PROSPECTS AND OPPORTUNITIES

Mass brands set to include more premium ingredients to appeal to consumers

Masstige brands set to contribute to higher value growth in the category

Non-compliant counterfeit products pose challenges for the entire industry

CATEGORY DATA

Table 114 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023

Table 115 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 116 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023

Table 117 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023

Table 118 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028

Table 119 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-ecuador/report.