MI LATAM

MARKET STUDIES

Beauty and personal care

CHILE

Structure, demand and business models
Evidence, uncertainty and future evolution



Free summary

Edition 2 · 2 November 2026

ENGLISH

VXOG SpA

Each source retains its date and population.

Original illustrative composition; it does not represent data.

An integrated market view

Beauty and personal care connects replenishment products, specialist care and gifts with manufacturers, importers, retailers and professional services. This study distinguishes final consumption, intermediate revenue, services, equipment and support activities: these are different economic units and must not be added together as a single final market.

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For October 2021-September 2022, T0 estimates CLP 16,345.89 per covered urban household per month, with a 95% confidence interval of CLP 15,598.76-17,093.02 and a coefficient of variation of 2.33%. The share of households with recorded positive spending is 49.50% within the observation window. The analysis uses 15,134 households, 3,399 clusters and 79 strata.

These are not 2026 national sales, purchase frequency, transaction size, annual usage penetration or a joint shopping basket.

Shampoo/conditioner, body care and fragrances jointly represent 51.44% of estimated historical T0 spending, approximate 95% CI 49.74-53.13%. This does not establish a share above 50%, a current share or premium preference.

The central quantitative result is a historical structure of spending by urban households covered by the IX EPF. A reconciled current national total for T0 is not presented. The 2025 references and 2026 offers retain their own populations and do not automatically update that survey.

The five contemporary monetary references help compare orders of magnitude but cannot close the total for our perimeter. Skin care and makeup cannot be separated exactly within certain EPF codes; channels and categories are also different axes. Multiplying the historical mean by all current households would introduce two unproven assumptions: stable spending and equivalent coverage. Inflating it using the broad index adds another: identical movement in pharmacy, cosmetics and hygiene and T0. Current size remains unidentified here; it is neither zero nor a partial sum presented as a total.

Sources: [S01], [S02], [S03]

Separate brand, formula and entry budget

The price pays for a one-hour assessment; formulas are standard and remain the supplier's. Registration, manufacturing and ownership are separate components.

If formula control or transfer is a project requirement, this catalog offer does not meet it by itself. Separate assessment, manufacturing, rights and procedures before budgeting.

This selects no supplier and verifies neither laboratory authorization nor the full price. Contractual ownership requires documentation; assignment is not presumed.

Sources: [S07], [S08]

Wholesale minimum, freight and inventory capital

The wholesale section separates a CLP 130,000 minimum from free freight above CLP 300,000. The CLP 170,000 gap to 300,000 does not prove that exactly that amount qualifies for free freight or that added inventory will sell.

Reconcile the channel rule and compare avoided freight with incremental cost, capital, turnover and extra inventory risk.

No actual freight, final price or sale observed; neither quotation nor purchase.

Sources: [S24]

Future evolution and delivery scope

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Retrospective holdout evaluation over Jan 2025-Sep 2026 yields MAE reductions of 44.19% and 40.27% at 1 and 3 months against seasonal naive for the broad pharmacy/cosmetics/hygiene index. The simple benchmark is retained at 6 and 12 months. Evaluation uses the current revised vintage, not real-time data or a T0 forecast.

From a September 2026 origin, point projections for the broad index are 166.51 for October and 185.60 for December 2026 (2018=100). October has ended at the editorial cutoff, but its official outcome is absent from this snapshot: this estimates an outcome not yet observed here. These are not sales, beauty-market size or T0 demand.

Exploratory nominal 80% bands covered 100% of the holdout; they are not adopted as calibrated intervals. Reassess when target months are published; do not extrapolate this improvement to a 2030 horizon.

Sources: [S32], [S33]

What the full report includes

Twelve dimensions,40 findings,31 families,ten subroutes and nine applications. Perimeter,territory and co-occurrence tables;five analytical or qualitative figures,economic-unit models,locatable sources and component-specific conditions.

One purchase, three full languages

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Attribution and essential terms

Source: Chile's Instituto Nacional de Estadísticas (INE), IX Encuesta de Presupuestos Familiares (Household Budget Survey), October 2021-September 2022, and CCIF classification. VXOG SpA selected the perimeter and produced the identified calculations, segmentations, intervals and interpretations. These are our own transformations, not official results or INE endorsement. Source and change notices are retained; INE assumes no responsibility for these interpretations. The IACM extension also uses INE series, 2018=100 [S32–S33], adapted by VXOG SpA on 1 November 2026, without INE endorsement.

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Analytical edition dated 2 November 2026. Adds INE calculations; other references retain their captures, periods and populations. Static edition: no future updates, monitoring, individual advice or business-outcome guarantee.

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[S01] INE: IX Household Budget Survey and own calculations · https://www.ine.gob.cl/estadisticas/sociales/ingresos-y-gastos/encuesta-de-presupuestos-familiares

[S02] INE: CCIF classification and own operational perimeter · https://www.ine.gob.cl/estadisticas/sociales/ingresos-y-gastos/encuesta-de-presupuestos-familiares

[S03] Euromonitor through public MarketResearch views: 2025 categories · https://www.marketresearch.com/Euromonitor-International-v746/Beauty-Personal-Care-Chile-45745034/

[S07] Clara Valenzuela: catalog manufacturing · https://www.claravalenzuela.com/products/asesoria-maquila-productos-solidos

[S08] Official Gazette: ISP fees 2026 · https://www.diariooficial.interior.gob.cl/publicaciones/2026/05/07/44443/01/2802985.pdf

[S24] Anita Franco Beauty: wholesale terms · https://anitafrancobeauty.com/pages/venta-mayorista-2025

[S32] INE — Series mensuales desde enero de 2018 a la fecha · https://www.ine.gob.cl/docs/default-source/actividad-mensual-del-comercio/cuadros-estadisticos/base-promedio-a%C3%B1o-2018-100/series-mensuales-desde-enero-de-2018-a-la-fecha.xls?sfvrsn=15bec33d_85

[S33] INE — Series empalmadas históricas · https://www.ine.gob.cl/docs/default-source/actividad-mensual-del-comercio/cuadros-estadisticos/base-promedio-a%C3%B1o-2018-100/series-empalmadas-hist%C3%B3ricas.xlsx?sfvrsn=fc45663d_78