“Beauty and personal care products (BPC) retailing is more varied around Europe than almost any other sector. From drugstores in Germany to supermarkets in other countries, the market is largely in the hands of non-specialists.”

– Richard Perks, Director of retail research

This report looks at the following areas:

This report examines the beauty and personal care retailing market across Europe, focusing mainly on the Big 5 economies: the UK, France, Germany, Italy and Spain.

The data in its entirety is contained in the five-country report, which gives a full overview of beauty retailing in these markets. It also includes market data for the rest of Europe's leading economies and the leading retailers table is pan-European.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market.
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Digital overtakes press in advertising spend

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The Body Shop deploying personalisation services in stores
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Supermarkets in-store beauty makeover

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The consumer – What you need to know
Fewer people shopping for beauty
Value brands popular when buying toiletries
An uplift in online purchasing
Convenience and price drive shoppers online...
...but experience also keeps people buying in-store
Mass-market brands seen as good value
Savvy shoppers price compare
What they buy
Purchasing levels remain high

A dip in the number of consumers buying beauty products

Signals that consumers are using fewer products

Brand types purchased
Fragrances remain most purchased prestige products

How and where they shop
More consumers are shopping online
Supermarkets remain dominant
Boots is the most used retailer
Online-only players strengthen their position
Discounters appeal to older consumers

Make-up purchasing moving online
Beauty and Personal Care Retailing - Europe - January 2019

Most only shop with one or two different retailers

Reasons for shopping online
Consumers think prices online are cheaper

Reasons for not shopping online
Enjoyment keeps people shopping in-store

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Prestige brands are considered to be overrated

Purchasing behaviour
Natural ingredients remain popular

Women more interested in sustainability

Older consumers show more brand loyalty

Young consumers need more guidance

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Abbreviations
Consumer research methodology
Appendix – Market size and forecast
Forecast methodology
Best- and worst-case forecasts

Market size

Sector size

Online market size

Acqua & Sapone

What we think
Online site highlights in-store promotions but is missing out on online sales
Active social media platforms

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Retail offering

AS Watson

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Recent focus on service and online
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The Body Shop

What we think

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New brand ambassadors could personalise ethical and green appeal
Missing out on new product benefits
Continued investment needed in physical retail
Broadening appeal to older consumers

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Retail offering

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Clarel

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Retail offering

**Debenhams**

What we think
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- Strengthening beauty offering, partnering with Estée Lauder to launch #Beautyhub
- Rewarding socially-engaged beauty consumers with discounts
- Exploring different beauty product category opportunities

Company background

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Retail offering

**dm-Drogerie Markt**

What we think
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- New products initiative
- Modernising and reshaping existing shops for a more enjoyable in-store experience
- Targeting the Chinese consumer market

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Retail offering

**Douglas Group**

What we think
- New CEO’s bold new strategy to rejuvenate and reposition the brand more upmarket
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Company background

Company performance
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Kiko Milano

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Retail offering

Müller

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