

### Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Beauty Retailing – Europe provides detailed coverage of the beauty retail sectors in five Western European markets: the UK, France, Germany, Italy and Spain. The data in its entirety is contained in the single copy fivecountry report, which gives a full overview of beauty retailing in these markets. Single country reports are also available for the UK, France, Germany, Italy and Spain.

## This report looks at the following areas:

In the European Summary – The Market section we also provide data for European beauty retailing beyond these five countries.

Our Europewide data in European Summary - The Market includes:

- Consumer spending on personal care goods and services for 18 European countries, 2010-15;
- Health and beauty specialists' retail sales, 2010-15, and forecasts, 2016-20 for 19 European countries;
- A ranking of Europe's top 15 beauty specialists by 2014 revenues.

Our coverage of the five major markets includes Mintel market size data for each of the major beauty and personal care categories.

## BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Table of Contents

Europe - Overview

Areas covered in this report

Technical notes

Market size

Mintel's market sizes

National statistics data

Retail sector sizes

Financial definitions

Abbreviations

#### VAT around Europe

Figure 1: VAT rates, 2011-15

#### Overview

#### What you need to know

Areas covered in this report

#### Executive Summary

#### Spending and inflation

Figure 2: Italy: Annual % change in total household expenditure and expenditure on personal care, 2011-15 (in current prices)

#### Channels of distribution

Figure 3: Italy: Estimated retail distribution of spending on beauty and personal care goods, 2014

#### Sector size and forecast

Figure 4: Italy: Annual % change in all retail sales (excl. fuel) and beauty specialists' retail sales, 2010-16

#### Leading specialists

#### Market shares

Figure 5: Italy: Estimated leading beauty specialists' share of consumer spending on personal care goods, 2015

#### Online

Figure 6: Italy: Any online purchases made in the last 12 months, by country, 2011-15

#### The consumer

#### Which products do they buy?

Figure 7: Italy: Beauty products purchased in the past 12 months, October 2015

#### Factors influencing choice of retailer

Figure 8: Italy: Factors that influence the choice of retailer, by beauty product category, November 2015

#### Shopping for prestige beauty

Figure 9: Italy: Reasons for buying prestige beauty products, October 2015

#### What we think

Issues and Insights

Understanding the success of Kiko Milano

# BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



## Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

|     | The facts                                                                                                                                          |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------|
| -   | The implications                                                                                                                                   |
| I   | Doing more to appeal to Italy's ageing population                                                                                                  |
|     | The facts                                                                                                                                          |
| -   | The implications                                                                                                                                   |
| ⁻h€ | Market – What You Need to Know                                                                                                                     |
| (   | Consumer spending remains low                                                                                                                      |
| (   | Channels battle for share of spending                                                                                                              |
|     | Health and beauty retail sales back in positive growth                                                                                             |
| Spe | ending and Inflation                                                                                                                               |
|     | Figure 10: Italy: Consumer spending on beauty and selected other goods (incl. VAT), 2010-15                                                        |
|     | Figure 11: Italy: Annual % change in total household expenditure and expenditure on personal care, 2011-15 (in current prices)                     |
| Pro | duct Market Breakdown                                                                                                                              |
|     | Figure 12: Italy: Main beauty and personal care markets, (incl. VAT), 2010-15                                                                      |
|     | Figure 13: Italy: Main beauty and personal care markets, forecasts, (incl. VAT), 2015-19                                                           |
|     | nflation<br>Figure 14: Italy: Harmonised indices of consumer prices: Annual % change, 2010-14                                                      |
|     | Figure 15: Italy: Harmonised index of consumer prices on personal care, annual % change, Jan 2014-November 2015                                    |
| Cha | annels of Distribution                                                                                                                             |
|     | Figure 16: Italy: Channels of distribution for beauty and personal care products, 2012-14                                                          |
|     | Figure 17: Italy: Any purchase of beauty products, by type of store, November 2014                                                                 |
| Sec | tor Size and Forecast                                                                                                                              |
|     | Specialists' sales growing again                                                                                                                   |
|     | Figure 18: Italy: Health & beauty retailers sales, (excl VAT), 2010-15                                                                             |
|     | Figure 19: Italy: Health & beauty retailers sales forecasts, (excl VAT), 2015-20                                                                   |
| (ey | Players – What You Need to Know                                                                                                                    |
|     | Acqua e Sapona the dominant player but facing increasing competition                                                                               |
| ,   | /oung focused retailers performing well                                                                                                            |
|     | A strong premium market                                                                                                                            |
|     | Online still in its infancy                                                                                                                        |
| Key | / Players                                                                                                                                          |
|     | Acqua e Sapone continues to lead the market but rivals catching up fast<br>Figure 20: Italy: Leading beauty specialists' net retail sales, 2011-15 |
|     | Figure 21: Italy: Leading beauty specialists' outlet numbers, 2011-15                                                                              |
|     | Figure 22: Italy: Leading beauty specialists, sales per outlet, 2011-15                                                                            |
| Ла  | -ket Shares                                                                                                                                        |
|     | Acqua e Sapone remains the leading specialist                                                                                                      |

# BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



### Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 23: Italy: Estimated leading beauty specialists' share of consumer spending on personal care goods, 2015

Figure 24: Italy: Leading beauty specialists' share of consumer spending on personal care goods, 2011-15

#### Online

#### Access now higher than usage

Figure 25: Italy: Percentage of households with broadband internet access and percentage of individuals who have used the internet in the past 12 months, 2011-15

#### Online retailing remains underdeveloped

Figure 26: Italy: Any online purchases made in the last 12 months, by country, 2011-15

Figure 27: Italy: Percentage of individuals purchasing from retailers within and outside of Italy, 2011-15

#### Online beauty within Italy

Figure 28: Italy: Leading beauty retailers, by presence of transactional website, January 2016

#### The Consumer – What You Need to Know

#### Fragrances the most purchased beauty product

#### Consumers most concerned with pricing and range

#### Prestige products popular with Italian beauty buyers

#### The Consumer – Which Products Do They Buy?

Figure 29: Italy: Beauty products purchased in the past 12 months, October 2015

Figure 30: Italy: Beauty products purchased in the past 12 months, by gender, October 2015

Figure 31: Italy: Beauty products purchased in the past 12 months, by age, October 2015

#### The Consumer – Factors Influencing Choice of Retailer

Figure 32: Italy: Range, price and promotion factors that influence the choice of retailer, by beauty product category, October 2015

Figure 33: Italy: Store-based factors that influence the choice of retailer, by beauty product category, October 2015

Figure 34: Italy: Online factors that influence the choice of retailer, by beauty product category, October 2015

#### The Consumer – Shopping for Prestige Beauty Products

Figure 35: Italy: Purchasing of prestige beauty products, by gender, October 2015

Figure 36: Italy: Purchasing of prestige beauty products, by age, October 2015

#### Why they buy prestige products

Figure 37: Italy: Reasons for buying prestige beauty products, October 2015

Figure 38: Italy: Reasons for buying prestige beauty products, by gender, October 2015

Figure 39: Italy: Reasons for buying prestige beauty products, by age and average income, October 2015

#### Appendix – Data sources, Abbreviations and Supporting Information

Abbreviations Data sources INSTITUTO CENTRALE DI STATISTICA (ISTAT) – Rome EUROSTAT – Luxembourg PIANETTA DISTRIBUZIONE, a report produced by Largo Consumo

#### Acqua e Sapone

What we think

# BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



## Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

#### Company background

#### Company performance

Figure 40: Acqua e Sapone: Estimated total retail revenues, 2011-15

Figure 41: Acqua e Sapone: Outlet data, 2011-15

#### Retail offering

#### **Douglas Perfumeries**

What we think

A focus on beauty

Expansion and diversification

Bringing Les Bellista to Germany

Multichannel

#### Company background

#### Company performance

Figure 42: Douglas Perfumeries: Financial performance, 2010/11-2014/15

Figure 43: Douglas Perfumeries: Outlet data, 2010/11-2014/15

#### Retail offering

#### Lush Retail

#### What we think

Unique and innovative product offering

Bigger stores to showcase brand uniqueness and full product range

Online sales growth on back of fully responsive website launch

In-store digital customer engagement

Scent and mood shopping app

In-store spa experience

Company background

#### Company performance

Figure 44: Lush Retail Ltd: Group financial performance, 2010/11-2014/15 Figure 45: Lush Retail Ltd: Outlet data, 2010/11-2014/15

#### Retail offering

#### Sephora

What we think Beauty retail trendsetter Connected beauty store Hair salon services Customisable digital experiences New shipping method for frequent shoppers Trialling beauty box subscription service Company background

# BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



### Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company performance

Figure 46: LVMH Selective Retail: Financial performance, 2010-14

#### Retail offering

#### The Body Shop

What we think

Pushing its ethical credentials in an increasingly crowded market

#### New loyalty scheme

Rush-hour makeovers

### Company background

#### Company performance

Figure 47: The Body Shop - Retail sales: Group financial performance, 2010-14

Figure 48: The Body Shop: Estimated UK sales performance, 2010-14

Figure 49: The Body Shop – Retail sales: Outlet data, 2010-14

Figure 50: The Body Shop: Outlet breakdown, 2010-14

#### Retail offering

#### **Yves Rocher**

#### What we think

New concept store offers an enhanced experience

Augmented reality app that lets consumers virtually apply makeup

A gift with every order

Competitive prices

Seal of authenticity

Spanish store expansion on back of a recovery in the country's beauty retail market

#### Company background

#### Company performance

Figure 51: Yves Rocher Groupe: Estimated group financial performance, 2011-15 Figure 52: Yves Rocher Groupe: Estimated outlet data, 2011-15

Retail offering

# BUY THIS REPORT NOW

VISET: store.mintel.com CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com