

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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



Beauty Retailing – Europe, January 2017 provides detailed coverage of the beauty retail sectors in the five major Western European markets: 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. Single country reports are also available for the UK, France, Germany, Italy and Spain.

This report looks at the following areas:

Health and beauty specialists' retail sales, 2012-16, and forecasts, 2017-21 for 27 European countries (The main exception is Russia);  
Consumer spending on personal care goods and services for 25 European countries, 2011-15;  
Europe's top 20 beauty specialists with revenues, store numbers and market shares.

Our coverage of the five major markets also includes proprietary Mintel consumer research. For our consumer research this year we focused on beauty products (body, hand and footcare; colour cosmetics; facial skincare; and men's and women's fragrances). We asked questions on the following topics:

- **Types of retailers used to buy beauty products**
- **Types of retailers used to buy beauty products: in-store vs online**
- **Attitudes towards shopping for beauty products.**

The results of our consumer surveys can be found in the relevant sections of the individual country reports as well as in Executive Summary - Europe - The Consumer and in the Databook.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://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](mailto: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

# Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

## Table of Contents

### Overview

Areas covered in this report

Technical notes

Market size

Mintel's market sizes

National statistics data

Retail sector sizes

Financial definitions

Abbreviations

VAT rates

Figure 1: VAT rates around Europe, 2012-17

### Executive Summary – Europe – The Market

The market

Specialists' sales

Figure 2: Europe: Health and beauty retailers' sales, ex VAT, 2012-16

Figure 3: Europe: Health and beauty retailers' forecast sales, ex VAT, 2017-21

Figure 4: Europe: Drugstores' forecast sales, ex VAT, 2012-16

Figure 5: Europe: Drugstores' forecast sales, ex VAT, 2017-21

Spending on personal care goods and services

Figure 6: Europe: Consumer spending on personal care products and services, inc. VAT, 2011-15

Inflation

Figure 7: Europe: Inflation in personal care goods and services, 2011-15

Figure 8: Europe: Estimated inflation rate in personal care goods, 2011-15

Leading retailers

Sales

Figure 9: Europe: Top 20 beauty specialists, Sales, 2013/14-2015/16

Outlets

Figure 10: Europe: Top 20 beauty specialists, Outlets, 2013/14-2015/16

Sales per outlet

Figure 11: Europe: Top 20 beauty specialists, Sales per outlet, 2013/14-2015/16

Market shares

Figure 12: Europe: Top 20 beauty retailers, Sales relative to all drugstore sales, 2015/16

Online

Figure 13: Europe: Estimated online share of all spending on personal care goods, 2015

What we think

Beauty performing well in good times and bad

The importance of in-store experience

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Online accounts for few purchases  
Where next?

## Executive Summary – Europe – The Consumer

### Who bought beauty products?

Figure 14: Europe: Buyers of beauty products in the last 12 months, November 2016

Figure 15: Europe: Male buyers of beauty products in the last 12 months, November 2016

Figure 16: Europe: Female buyers of beauty products in the last 12 months, November 2016

### Where they shop for beauty products

Figure 17: Europe: Pharmacy/drugstore/parapharmacy shoppers for beauty products either in-store or online in the last 12 months, November 2016

Figure 18: Europe: Supermarket/hypermarket shoppers for beauty products either in-store or online in the last 12 months, November 2016

Figure 19: Europe: Perfumery shoppers for beauty products either in-store or online in the last 12 months, November 2016

### Attitudes to shopping for beauty products

Figure 20: Europe: Those who agree with attitudes to beauty retailing, November 2016

Figure 21: Europe: Ranking of those who agree with attitudes to beauty retailing, November 2016

## Executive Summary – Europe – Innovation and Launch Activity

France: Dior and Olay deliver personalised product recommendations

France: Urban Decay opens first permanent store

Netherlands: Plein offers automated subscription service

France: Marionnaud targets the 'transumer'

Germany: dm-drogerie markt collaborates with popular vlogger

Italy: Kiko Milano integrates technology in new concept

South Korea: Lipstick Lab offers custom two-tone lipstick

US: American beauty brands enlist male ambassadors

## France

Overview

What you need to know

Areas covered in this report

Executive summary

The market

Spending and inflation

Figure 22: France: Annual percentage growth in spending on personal care articles and all spending, 2011-16

Channels of distribution

Figure 23: France: Estimated channels of distribution for spending on beauty and personal care goods, 2015

Sector size and forecast

Leading players

Key metrics

Market shares

Figure 24: France: Leading beauty specialists: Shares of all beauty retailers' sales, 2015

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Online

The consumer

Where they shop

Figure 25: France: Where they shop for beauty products, in-store and online, November 2016

Attitudes to Shopping for Beauty Products

Figure 26: France: Attitudes to shopping for beauty products, November 2016

What we think

Issues and Insights

Stores are important but must move with the times

The facts

The implications

The rise of the green consumer

The facts

The implications

The market – What you need to know

Growth in economy and beauty spending is low

Low price rises on personal care items

Grocers and specialist chains are the main channels

Beauty retailers thriving despite weak spending

Spending and inflation

Economic growth is sluggish

Market size and trend

Figure 27: France: Consumer spending on beauty and selected other goods (incl. VAT), 2011-16

Inflation

Figure 28: France: Consumer prices of personal care goods and services items, Annual % change, 2011-15

Figure 29: France: Consumer price inflation on personal care products and services, annual % change, January 2015-November 2016

Product market breakdown

Figure 30: France: Main beauty markets, spending (inc VAT), 2011-16

Figure 31: France: Main beauty markets, spending (inc VAT), forecasts, 2016-20

Channels of distribution

Figure 32: France: Where they shop for beauty products, in-store and online, November 2016

Grocers capture most spending

Beauty specialists popular across the board

The parapharmacy concept building strength

Department stores significant, particularly in Paris

Cosmetic ranges in clothing stores try to draw in customers

Figure 33: France: Estimated channels of distribution for spending on beauty and personal care goods, 2015

Sector size and forecast

Total retail sales recovered in 2015, further growth forecast in 2016

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Beauty retailers' sales accelerating

Figure 34: France: Health & beauty retailers sales, excl VAT, 2011-16

Figure 35: France: Health & beauty retailers sales, Forecasts, excl VAT, 2016-21

### Leading players – What you need to know

Specialists as a whole are thriving

Top nine generate 70% of sector sales

Online small but growing

Social media a crucial tool amongst younger age groups

Leading players

Specialists thriving

Low priced cosmetics a key growth area

Integration of beauty services

Natural/green credentials increasingly important

Sephora continues to innovate

Nocibé thrives under Douglas ownership

Marionnaud fighting back

Yves Rocher new store format

Figure 36: France: Leading beauty specialists, Sales, 2013-16

Figure 37: France: Leading beauty specialists, Outlet numbers, 2013-16

### Sales per outlet

Figure 38: France: Leading beauty specialists, Sales per outlet, 2013-16

### Market shares

Figure 39: France: Leading beauty specialists: Shares of all beauty retailers' sales, 2013-16

### Online

Internet usage

Shopping online

Figure 40: France: Online buyers in last 12 months in key sectors, 2011-16

### Online sales

Leading online players

Figure 41: France: Beauty retailers: Transactional websites, December 2016

### Social media

Which social media do consumers use for beauty content?

Figure 42: France: Online platforms visited to view beauty content, by age, 2015

What beauty content are consumers interested in?

Figure 43: France: Interest in future beauty content on social media, by gender, 2015

What beauty content activities do they do online?

Figure 44: France: Beauty and personal care social media activities, by age, 2015

What do they think about beauty blogs and vlogs?

Figure 45: France: Attitudes to beauty blogs and vlogs, by age, 2015

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### The consumer – What you need to know

Women the key demographic

Grocers the most popular channel

Almost half had bought online

Green and natural the two most important concerns

Online and in-store both valued

Personalisation an opportunity

Where They Shop for Beauty Products

Women the main shoppers

Figure 46: France: Who shops for beauty products, by age, November 2016

Figure 47: France: Where they shop for beauty products, in-store and online, November 2016

### Loyalty

Figure 48: France: Repertoire of in-store retailers used, by age, November 2016

### Customer profiles

Figure 49: France: Profile of those who bought in-store, by type of retailer used, November 2016

Figure 50: France: Profile of those who bought online, by type of retailer used, November 2016

### Attitudes to shopping for beauty products

Figure 51: France: Attitudes to shopping for beauty products, November 2016

### “Green” and “natural” top the list of concerns

Figure 52: France: Selected attitudes to shopping for beauty products, by age, November 2016

### The influence of online

Figure 53: France: Selected attitudes to shopping for beauty products, by age, November 2016

### Many strengths in store environments

Figure 54: France: Selected attitudes to shopping for beauty products, by age, November 2016

### Younger shoppers want more personalisation

Figure 55: France: Selected attitudes to shopping for beauty products, by age, November 2016

### Attitudes by where people shop

Figure 56: France: Attitudes to shopping for beauty products by where people shop, November 2016

### Other consumer research

#### Types of cosmetic brands bought

Figure 57: France: Make-up brands used/bought by women in the last 12 months, by age, 2016

#### Buying fragrance

Figure 58: France: Interest in trying fragrance tools or concepts if available, 2016

#### Facial skincare shopping behaviours

Figure 59: France: Women’s purchasing behaviours of facial skincare products, 2016

### Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

### Germany

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Overview

What you need to know

Areas covered in this report

Executive summary

The market

Spending and inflation

Figure 60: Germany: Annual % change in total household expenditure and expenditure on personal care, 2012-16

Figure 61: Germany: Consumer price inflation on personal care products and services, annual % change, May 2015-Oct 2016

Channels of distribution

Figure 62: Germany: Estimated channels of distribution for personal care products, 2016

Sector size and forecast

Leading players

dm-drogerie markt extends leadership position

Market shares

Figure 63: Germany: Leading beauty specialists: Shares of all beauty retailers' sales, 2016

Online small but growing

Social media an important part of the purchase journey

The consumer

Where they shop

Figure 64: Germany: Where they shop for beauty products, in-store or online, November 2016

Attitudes to shopping for beauty products

Figure 65: Germany: Attitudes to shopping for beauty products, November 2016

What we think

Issues and insights

The changing role of the store

The facts

The implications

Greater clarification desired for environmental and health concerns

The facts

The implications

The market – What you need to know

Consumer spending on personal care remains strong

Personal care category has an inflationary impact

Colour cosmetics the fastest growing segment

Drugstores continue to dominate the market

Strong but slowing growth in retail sales

Spending and inflation

Economy healthy

Consumer spending

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Figure 66: Germany: Consumer spending on personal care products and services (incl. VAT), 2011-16

### Inflation

Figure 67: Germany: Harmonised index of consumer prices, annual % change, 2011-15

Figure 68: Germany: Consumer price inflation on personal care products and services, annual % change, May 2015-Oct 2016

### Product market breakdown

Figure 69: Germany: Main beauty markets, Spending (inc VAT), 2011-16

Figure 70: Germany: Main beauty markets, Spending (inc VAT), Forecasts, 2016-20

### Channels of distribution

Specialists dominate

Discounters grow their influence

Department stores losing relevance

Online dominated by pureplays

Figure 71: Germany: Estimated channels of distribution for personal care products, 2016

### Sector size and forecast

Strong but slowing growth

Figure 72: Germany: Health & beauty retailers' sales, excl VAT, 2011-16

Figure 73: Germany: Health & beauty retailers sales, forecasts, excl VAT, 2016-21

Leading players – What you need to know

dm-drogerie market extends its dominant position

Rossmann looks to acquire Budni

dm-drogerie market enjoys market share gains

Online remains small for beauty retailers

Leading players

dm-drogerie markt cements its leading position

New store openings drive sales growth at Rossmann

A calmer year for Douglas

Budnikowsky eyed by Rossmann

Kiko Milano small but growing

Figure 74: Germany: Leading beauty specialists, Sales, 2013-16

Figure 75: Germany: Leading beauty specialists, Outlets, 2013-16

Figure 76: Germany: Leading beauty specialists, Sales per outlet, 2013-16

### Market shares

Figure 77: Germany: Leading beauty specialists: Shares of all beauty retailers' sales, 2013-16

### Online

Internet usage

Shopping online

Figure 78: Germany: Online buyers in last three months in key sectors, 2007-16

Figure 79: Germany: Proportion of beauty shoppers that have bought beauty products online in the past 12 months, by age, November 2016

Online beauty sales

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)



## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Leading online players

#### Social media

Bloggers trump in-store staff for a third of 16-24 year olds

16-24 year olds not fazed by bloggers/vloggers being paid

Facebook most used but 16-24s prefer YouTube

#### Freebies and advice drive engagement

Figure 80: Germany: Interest in future beauty content on social media, by gender, 2015

#### Competitions hold wide appeal

#### 16-24s: the selfie generation

Figure 81: Germany: Beauty and personal care social media activities, by age, 2015

### The consumer – What you need to know

#### Drugstores remain the firm favourite

#### More information wanted

#### Personalisation desired by 16-24 year olds

#### The internet as a source of advice and inspiration

#### Where they shop for beauty products

#### Women still the main purchasers

Figure 82: Germany: Who shops for beauty products, by age and gender, November 2016

#### Drugstores remain the firm favourite

Figure 83: Germany: Where they shop for beauty products, November 2016

#### Lack of loyalty among young shoppers

Figure 84: Germany: Repertoire of in-store retailers used, by age group, November 2016

#### Specialists attract the most affluent

Figure 85: Germany: Profile of those who bought either in-store or online, by type of retailer used, November 2016

#### 97% of beauty buyers shop in-store

Figure 86: Germany: Where they shop for beauty products in-store, November 2016

#### Multichannel retailers fall behind online

#### Online beauty is about more than just sales

Figure 87: Germany: Where they shop for beauty products online, November 2016

#### Product interaction still important

Figure 88: Germany: Women's purchasing behaviours for facial skincare products, 2016

#### Attitudes to shopping for beauty products

#### Consumers want more information

Figure 89: Germany: Attitudes to shopping for beauty products, November 2016

#### Online an important source of information for young consumers

Figure 90: Germany: Selected attitudes to shopping for beauty products, by age, November 2016

#### Customisation appeals to 16-24 year olds

Figure 91: Germany: Selected attitudes to shopping for beauty products, by age, November 2016

#### Experience and experimentation remain important

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Figure 92: Germany: Selected attitudes to shopping for beauty products, by age, November 2016

### Desire for information extends across the age brackets

Figure 93: Germany: Selected attitudes to shopping for beauty products, by age, November 2016

### Attitudes by where they shop

Figure 94: Germany: Attitudes to shopping for beauty products by where they shop, November 2016

### What they bought

Figure 95: Germany: Make-up brands bought by women in the last 12 months, by age, 2016

### German consumer interest in fragrance changing technology

Figure 96: Germany: Interest in trying fragrance tools or concepts if available, 2016

### Appendix – Data sources, abbreviations and supporting information

#### Abbreviations

#### Data sources

## Italy

### Overview

#### What you need to know

#### Areas covered in this report

#### Executive summary

#### The market

#### Spending and inflation

Figure 97: Italy: Annual % change in total household expenditure and expenditure on personal care goods and services, 2011-16

Figure 98: Italy: Consumer price inflation on personal care products and services, annual % change, Jun 2015-Nov 16

#### Channels of distribution

Figure 99: Italy: Channels of distribution for personal care products, 2015

#### Sector size and forecast

Figure 100: Italy: Annual % change in all retail sales (excl. fuel) and beauty specialists' retail sales, 2011-16

#### Leading players

#### Leading retailers strengthen position

#### Specialists growing share of personal care spending

Figure 101: Italy: Estimated leading beauty specialists' shares of consumer spending on personal care goods, 2016

#### Online remains small but is growing

Figure 102: Italy: Any online purchases made in the last 12 months, by country, 2007-16

#### The consumer

#### Who shops for beauty products

#### Where they shop

Figure 103: Italy: Where they shop for beauty products, November 2016

Figure 104: Italy: Where they shop for beauty products, in-store or online, November 2016

#### Attitudes to shopping for beauty products

Figure 105: Italy: Attitudes to shopping for beauty products, November 2016

#### What we think

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Issues and insights

Using online to engage beauty consumers and drive sales

The facts

The implications

Growing demand for natural and environmentally-friendly beauty products

The facts

The implications

The market – What you need to know

Consumer spending on personal care remains weak

Colour cosmetics set to become the biggest segment

Pharmacies steal greater share of consumer spending

Retail sales continue to rise, up 2.8% in 2015

Spending and inflation

General economy

Consumer spending

Figure 106: Italy: Consumer spending on personal care goods and services (incl. VAT), 2011-16

### Inflation

Figure 107: France: Consumer prices of personal care goods and services, Annual % change, 2011-15

Figure 108: Italy: Consumer price inflation on personal care products and services, annual % change, Jun 2015-Nov 16

Figure 109: Italy: Breakdown of consumer price inflation on personal care products and services, annual % change, Jun 2015-Nov 16

### Product market breakdown

Figure 110: Italy: Main beauty markets, spending (inc VAT), 2011-16

Figure 111: Italy: Main beauty markets, spending (inc VAT), Forecasts, 2016-20

### Channels of distribution

Pharmacies grow in strength

Figure 112: Italy: Estimated channels of distribution for personal care products, 2013-15

Grocers continue to dominate

Figure 113: Italy: Estimated channels of distribution for personal care products, 2015

Department stores losing share

Figure 114: Italy: Where they shop for beauty products, November 2014/2016

### Sector size and forecast

Specialists' retail sales rise 2.8% in 2015

Figure 115: Italy: Health & beauty retailers sales (excl VAT), 2011-16

Figure 116: Italy: Health & beauty retailers sales, Forecasts, excl VAT, 2016-21

Leading players – What you need to know

Acqua & Sapone's maintains market leading position

Tigotá further establishes position in the market

Specialists enjoy market share gains

Online retailing remains underdeveloped

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Leading players

#### Acqua & Sapone continues to dominate

Figure 117: Italy: Leading beauty specialists, Estimated sales, 2013-16

#### Wycon rapidly expanding store network

Figure 118: Italy: Leading beauty specialists, Estimated outlet numbers, 2013-16

#### Sales per outlet

Figure 119: Italy: Leading beauty specialists, Sales per outlet, 2013-16

### Market shares

#### Consolidation in the specialist beauty market

Figure 120: Italy: Estimated leading beauty specialists' shares of consumer spending on personal care goods, 2016

Figure 121: Italy: Leading beauty specialists' estimated share of consumer spending on personal care goods, 2013-16

### Online

#### Internet usage

#### Shopping online

Figure 122: Italy: Any online purchases made in the last 12 months, by country, 2007-16

Figure 123: Italy: Any online purchases made in the last three months, by sector, 2007-16

#### Beauty shopping: In-store vs online

Figure 124: Italy: Where they shop for beauty products, in-store or online, November 2016

#### Leading online players

Figure 125: Italy: Beauty retailers: Transactional websites, January 2016

### Social media

#### Beauty and personal care social media activities

Figure 126: Italy: Beauty and personal care social media activities, 2015

#### Interest in future beauty content on social media

Figure 127: Italy: Interest in future beauty content on social media, 2015

### The Consumer – What you need to know

#### Women drive beauty purchasing

#### Specialist beauty stores attract the most shoppers

#### In-store remains more popular than online

#### Consumers want personal product recommendations

#### Where they shop for beauty products

#### Women remain the biggest purchasers

Figure 128: Italy: Who shops for beauty products, by age and gender, November 2016

#### Consumers favour specialist retailers

Figure 129: Italy: Where they shop for beauty products, November 2016

#### Young shoppers show less retailer loyalty

Figure 130: Italy: Repertoire of in-store retailers used, by age, November 2016

#### Department stores attract affluent consumers

Figure 131: Italy: Profile of those who bought either in-store or online, by type of retailer used, November 2016

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Young people drive online beauty purchasing

Figure 132: Italy: Where they shop for beauty products, in-store vs online, by age, November 2016

### Grocers failing to attract online shoppers

Figure 133: Italy: Where they shop for beauty products, in-store and online, November 2016

### Purchasing behaviour

Figure 134: Italy: Women's purchasing behaviours for facial skincare products, 2016

### Attitudes to shopping for beauty products

Consumers still prefer to browse and test in-store

### Demand for personalised recommendations is high

Figure 135: Italy: Attitudes to shopping for beauty products, November 2016

### Young shoppers want in-store beauty services

### Older Millennials want to customise their beauty products

Figure 136: Italy: Selected attitudes to shopping for beauty products, by age, November 2016

### Mature consumers prefer natural products

Figure 137: Italy: Consumer who look for beauty products that are made with natural ingredients, by age, November 2016

### Attitudes by where they shop

Figure 138: Italy: Attitudes to shopping for beauty products by where they shop, November 2016

### What they bought

### Mass market brands dominate

Figure 139: Italy: Make-up brands bought by women in the last 12 months, by age, 2016

### Big demand for fragrance wipes

Figure 140: Italy: Interest in trying fragrance tools or concepts if available, 2016

### Appendix – Data sources, abbreviations and supporting information

#### Abbreviations

#### Data sources

## Spain

### Overview

### What you need to know

### Areas covered in this report

### Executive summary

### The market

### Spending and inflation

Figure 141: Spain: Consumer prices, annual % change, monthly data, 2015-16

### Product market breakdown

### Channels of distribution

### Sector size and forecast

### Leading players

### Key metrics

### Market shares

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Figure 142: Spain: Leading beauty specialists: Shares of all beauty retailers' sales, 2015/16

### Online

#### The consumer

#### Who buys?

#### Where they shop

Figure 143: Spain: Where they shop for beauty products, November, 2016

#### Customer profiles

Figure 144: Spain: Profile of those who bought in-store, by type of retailers used, November 2016

#### Attitudes to shopping for beauty products

Figure 145: Spain: Attitudes to shopping for beauty products, November 2016

#### What we think

#### Issues and insights

#### The growth potential in environmental concerns

#### The facts

#### The implications

#### The growth of the specialists

#### The facts

#### The implications

#### The market – What you need to know

#### Beauty spending on the rise

#### Makeup gaining ground

#### Supermarkets account for one third of beauty spend

#### Clarel brings growth to the sector

#### Spending and inflation

#### General economy

#### Market size and trend

Figure 146: Spain: Consumer spending on beauty and selected other goods and services (inc VAT), 2011-16

#### Inflation

Figure 147: Spain: Consumer prices of personal care goods and services, Annual % change, 2011-16

Figure 148: Spain: Consumer prices, annual % change, monthly data, 2015-16

#### Product market breakdown

Figure 149: Spain: Main beauty markets, Spending (inc VAT), 2011-16

Figure 150: Spain: Main beauty markets, spending (inc VAT), Forecasts, 2016-20

#### Channels of distribution

Figure 151: Spain: Estimated channels of distribution of spending on beauty and personal care products, inc VAT, 2013-15

#### Sector Size and Forecast

Figure 152: Spain: Health & beauty retailers' sales, (ex VAT) 2011-16

Figure 153: Spain: Health & beauty retailers' sales (ex VAT), Forecasts, 2016-21

#### Leading players – What you need to know

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Clarel leads the sector

Market shares

Online remains small

Leading players

### Clarel leadership to be challenged

Figure 154: Spain: Leading beauty retailers, Sales, 2012/13-2015/16

Figure 155: Spain: Leading beauty retailers, Outlets, 2012/13-2015/16

Figure 156: Spain: Leading beauty retailers, Sales per outlet, 2012/13-2015/16

### Market shares

Figure 157: Spain: Leading beauty specialists: Shares of all beauty retailers' sales, 2013/14-2015/16

### Online

#### Internet usage

Figure 158: Spain: 16-74 year olds who regularly use the internet, 2005-16

#### Shopping online

Figure 159: Spain: Online buyers in key sectors, 2007-16

### The consumer – What you need to know

Supermarkets, perfumeries and department stores most popular channels

Shoppers looking for environmentally friendly products and good service

Where they shop for beauty products

Bias to women

#### Where they shop

Figure 160: Spain: Where they shop for beauty products, November, 2016

#### Who shops where

Figure 161: Spain: Profile of those who bought in-store, by type of retailer used, November 2016

Figure 162: Spain: Profile of those who bought online, by type of retailer used, November 2016

#### Women's buying habits

Figure 163: Spain: Women's purchasing behaviours for facial skincare products, 2016

#### Attitudes to shopping for beauty products

Figure 164: Spain: Attitudes to shopping for beauty products, November 2016

#### Attitudes by where people shop

#### An opportunity for drugstores

Figure 165: Spain: Attitudes to shopping for beauty products by where they shop, November 2016

### Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

## UK

### Overview

What you need to know

Products covered in this Report

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

# Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

## Executive summary

### The market

#### BPC market grows 0.4% in 2016

Figure 166: Market size and forecast: consumer spending on all beauty and personal care products (including VAT), 2011-21

#### Brexit could lead to a return to the 'lipstick index'

#### Specialists perform in line with the market

Figure 167: Health and beauty specialists' sales (including VAT), 2011-21

#### Opportunity for mature shoppers to be better represented

#### Companies and brands

#### Highly fragmented market

#### Superdrug delivers growth, whilst Boots suffers maturity

#### Food discounters grow their share of consumer spending

Figure 168: Estimated distribution of spending on beauty and personal care products, 2016

#### Growth in online BPC sales set to accelerate in 2017

#### Specialists invest in technology to elevate the in-store experience

### The consumer

#### Facial skincare is the most purchased category

Figure 169: Beauty products bought in the last 12 months, October 2016

#### Consumers trade up for fragrance

Figure 170: Brand types bought for beauty products, October 2016

#### Specialists are the preferred retailer

Figure 171: Where consumers purchase beauty products, by retailer, October 2016

#### Loyalty rewards could be more personal

Figure 172: Key drivers of overall satisfaction with beauty retailer used most often to purchase in-store, January 2017

#### Demand for try-before-you-buy samples

Figure 173: Factors that would make consumers more likely to choose one retailer over another online, October 2016

#### Physical stores the preference for discovering new beauty products

Figure 174: Attitudes towards purchasing beauty, October 2016

### What we think

#### Issues and insights

#### Prestige beauty an opportunity to boost value growth

#### The facts

#### The implications

#### The evolving beauty retail environment

#### The facts

#### The implications

#### Earning loyalty among beauty shoppers

#### The facts

#### The implications

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)



## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### The market – What you need to know

BPC market grows 0.4% in 2016

Personal care segment in decline, slowing growth for beauty sales

Specialists perform in line with the market

Opportunity for mature shoppers to be better represented

Brexit could lead to a return to the 'lipstick index'

### Market size and forecast

BPC market grows 0.4% in 2016

Figure 175: Market size and forecast: consumer spending on all beauty and personal care products (including VAT), 2011-21

### Spending to top £11 billion by 2021

Figure 176: Market size and forecast: consumer spending on all beauty and personal care products (including VAT), at current and constant prices, 2011-21

### Forecast methodology

The impact of the EU referendum vote

BPC market historically remains robust during economic downturn

Consumers are expecting towards price rises

### Market likely to grow regardless of economic uncertainty

Figure 177: Alternative market scenarios for the post-Brexit clothing and accessories market, at current prices, 2016-21

Figure 178: Detailed Post-Brexit scenarios for the clothing and accessories market, at current prices, 2016-21

### Market segmentation

#### Beauty products: segment forecast

Figure 179: Consumer spending on beauty products, 2011-21

Figure 180: Consumer spending on beauty products, 2011-21

#### Beauty category performance

Figure 181: Consumer spending on beauty products, by category, 2015 and 2016

#### Colour cosmetics

#### Fragrances

#### Facial skincare

#### Body, hand and foot care

#### Personal care products: segment forecast

Figure 182: Consumer spending on personal care products, 2011-21

Figure 183: Consumer spending on personal care products, 2011-21

#### Consumer spending on personal care items

Figure 184: Total consumer spending on personal care items (including VAT), 2011-15

### Forecast methodology

#### Sector size and forecast

#### Health and beauty specialists' sales

Figure 185: Health and beauty specialists' sales (including VAT), 2011-21

Figure 186: Health and beauty specialists' sales (including VAT), at current and constant prices, 2011-21

#### Annual growth in beauty specialists sales vs annual growth in BPC spend

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Figure 187: Annual growth in specialists' sector sales and annual growth in spending on beauty and personal care products, 2017-21 (fore)

### Outlet and enterprise numbers

Figure 188: Health and beauty specialists: Outlet numbers, 2012-16

Figure 189: Health and beauty specialists: Enterprise numbers, 2012-16

### Market drivers

#### Youth population in decline

Figure 190: Trends in the age structure of the UK population, 2011-21

#### Opportunity for mature shoppers to be better represented

#### Consumer financial sentiment remains positive

Figure 191: How consumers describe their financial situation, November 2016

#### Brexit could lead to a return to the 'lipstick index'

#### Prestige beauty bought as a treat

Figure 192: Reasons for choosing premium brands over mass, by gender, October 2016

#### The consumer – What you need to know

#### Facial skincare is the most purchased category

#### Consumers trade up for fragrance

#### Specialists are the preferred retailer

#### Loyalty rewards could be more personal

#### Boots' staff expertise sets it apart

#### Demand for try-before-you-buy samples

#### Personalised recommendations could boost purchases among young men

#### Demand for natural beauty boosted by clean-eating trend

#### Physical stores the preference for discovering new beauty products

#### Beauty products bought

#### Facial skincare most purchased category

Figure 193: Beauty products bought in the last 12 months, October 2016

#### Fragrance popular among all demographics

#### Older men the least engaged with skincare

Figure 194: Beauty products bought in the last 12 months among men, by age, October 2016

#### Young men prioritise facial skincare

#### Brand types bought

#### Consumers trade up for fragrance

Figure 195: Brand types bought for beauty products, October 2016

#### Mass-market skincare brands preferred

#### More money spent on mass-market brands

#### Retailers purchased from

#### Specialists are the preferred retailer

Figure 196: Where consumers purchase beauty products, by retailer type, October 2016

#### Boots retains its dominant position

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Figure 197: Where consumers purchase beauty products, by retailer, October 2016

Superdrug gains an increase in shoppers

Discount supermarkets also make gains

Men opt for supermarkets over the specialists

Figure 198: Where consumers purchase beauty products in-store or online, by gender, October 2016

Amazon attracts the most online

Figure 199: Where consumers purchase beauty products, in-store or online, October 2016

Repertoire analysis

Figure 200: Repertoire of retailers used for purchasing beauty products in the last 12 months, October 2016

Customer satisfaction

Overall satisfaction levels high

Figure 201: Satisfaction with the retailer shopped at most often for beauty products, October 2016

Key drivers analysis

Loyalty rewards could be more personal

Figure 202: Key drivers of overall satisfaction with beauty retailer used most often to purchase in-store, January 2017

Customer service needs prioritising

Expanding beauty services outside London

Store environment most closely correlates with satisfaction

Figure 203: Overall satisfaction with beauty retailers used most often to purchase in-store - Key driver output, January 2017

Satisfaction by retailer

Boots' staff expertise sets it apart

Figure 204: Satisfaction of customers who purchase beauty products from Boots most often, in relation to the overall average, October 2016

Superdrug scores above average for value of own-brands

Figure 205: Satisfaction of customers who purchase beauty products from Superdrug most often, in relation to the overall average, October 2016

Tesco shoppers content with loyalty rewards

Figure 206: Satisfaction of customers who purchase beauty products from Tesco most often, in relation to the overall average, October 2016

Factors to encourage online purchases

Demand for try-before-you-buy samples

Figure 207: Factors that would make consumers more likely to choose one retailer over another online, October 2016

Emails are an incentive to shop online

Personalised recommendations could boost purchases among young men

Attitudes towards buying beauty

Demand for natural beauty boosted by clean-eating trend

Figure 208: Attitudes towards purchasing beauty, October 2016

Environmental concerns heighten

Opportunity for more diverse beauty collaborators

Stores the preference for discovering new beauty products

Figure 209: Attitudes towards purchasing beauty, October 2016

Technology to boost the in-store experience

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Key players – What you need to know

Highly fragmented market

Superdrug delivers growth, whilst Boots suffers maturity

Department stores gain market share

Food discounters grow their share of consumer spending

Growth in online BPC sales set to accelerate in 2017

Using apps to attract online beauty shoppers

Specialists invest in technology to elevate the in-store experience

Advertising spend on the rise

Boots benefits from a good reputation

Market share

Highly fragmented market

Figure 210: Leading specialist and non-specialist retailers: Estimated market shares, 2015

Figure 211: Leading specialist and non-specialist retailers: Estimated market shares, 2013-15

Note on market shares

Leading specialist retailers

Superdrug growing despite maturity

Boots lacks a compelling online offer

Prestige beauty retailers outperform

Leading specialists by sales

Figure 212: Leading specialist retailers: Net revenues (excluding VAT), 2011-15

Leading pharmacies by sales

Figure 213: Leading pharmacy chains: Net revenues (excluding VAT), 2011-15

Outlet numbers and sales per outlet

Figure 214: Leading specialist retailers: Outlet numbers, 2011-15

Figure 215: Leading specialist retailers: Annual sales per outlet (excluding VAT), 2011-15

Operating profits and margins

Figure 216: Leading specialist retailers: Operating profits, 2011-15

Figure 217: Leading specialist retailers: Operating margins, 2011-15

Leading non-specialist retailers

Discount grocers continue in strength

Figure 218: Leading non-specialist retailers: Estimated sales growth by segment, 2015

Leading non-specialists: Estimated beauty revenues

Figure 219: Leading non-specialist retailers: Estimated beauty and personal care goods sales (excluding VAT), 2013-15

The supermarkets

Figure 220: Leading grocers: Health and beauty space allocation estimates, October 2016

The discounters

Figure 221: Leading mixed goods discounters: Health and beauty space allocation estimates, August 2016

The department stores

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Figure 222: Leading department stores: Health and beauty space allocation estimates, March 2016

QVC launches Beauty iQ

Space allocation summary

Figure 223: Leading health and beauty retailers: Health and beauty products estimated space allocation, December 2016

Specialist personal care and beauty retailers

Supermarkets' in-store space largely occupied by toiletry essentials

Department stores focus on core beauty products

Figure 224: Leading health and beauty retailers: Health and beauty products estimated detailed space allocation, December 2016

Figure 225: Leading health and beauty retailers: Health and beauty products estimated detailed space allocation, December 2016

Channels to market

Specialists struggle to grow share

Aldi and Lidl gain share

Figure 226: Estimated distribution of spending on beauty and personal care products, 2016

Department stores drive value growth

Figure 227: Estimated distribution of spending on beauty and personal care products, in percentage and value terms (including VAT), 2015 and 2016

Online

Online BPC market forecast to grow 8.8% in 2017

Figure 228: Estimated online consumer spending on BPC products, 2011-17

The specialists gain momentum online

Figure 229: Retailer shares of online sales of BPC products, 2014-16

Launch activity and innovation

Estée Lauder targets Millennials with new London store

Figure 230: The Estée Edit, Carnaby Street 2016

Department stores improve beauty experience instore

Figure 231: Harvey Nichols Beauty Lounge, 2016

The rise of magic mirrors

Personalising the online experience

Figure 232: Feel Unique Platinum, 2016

Try before you buy gets a digital make-over

Figure 233: Feel Unique Make Up Live App, 2016

Sephora rewards loyal social media followers

Ocado partners with Marie Claire on new beauty store

Missguided taps into high-street beauty trend

Figure 234: Missguided Beauty Range, 2016

Lush hosts instore beauty and fitness sessions

Superdrug draws attention to own-brand with vending machines

WAH Nails new flagship boasts virtual reality technology

Figure 235: WAH London Soho Store, 2016

The Good Ship Benefit

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### Advertising and marketing activity

#### Product category advertising spend up 14% in 2015

Figure 236: Recorded above-the-line, online display and direct mail total advertising expenditure on beauty, personal care and body care, by leading retailers, 2013-16

#### TV and Press accounts for the vast majority of advertising spend

Figure 237: Recorded above-the-line, online display and direct mail total advertising expenditure on beauty, personal care and body care, by leading retailers, 2015

#### Nielsen Ad Intel coverage

#### Brand research

#### What you need to know

#### Brand map

Figure 238: Attitudes towards and usage of selected brands, December 2016

#### Key brand metrics

Figure 239: Key metrics for selected brands, December 2016

#### Brand attitudes: Superdrug offers value for money

Figure 240: Attitudes, by brand, December 2016

#### Brand personality: The Body Shop retains its ethical reputation

Figure 241: Brand personality – Macro image, December 2016

#### Boots has a reliable and welcoming image

Figure 242: Brand personality – Micro image, December 2016

#### Brand analysis

#### Boots has an opportunity to boost appeal amongst men

Figure 243: User profile of Boots, December 2016

#### Superdrug benefits from a reputation of reliability

Figure 244: User profile of Superdrug, December 2016

#### Lush attracts young consumers with its trendsetting image

Figure 245: User profile of Lush, December 2016

#### The Perfume Shop struggles to differentiate itself

Figure 246: User profile of The Perfume Shop, December 2016

#### Space NK proves popular with older Millennials

Figure 247: User profile of Space NK, December 2016

#### The Body Shop's ethics set it apart

Figure 248: User profile of The Body Shop, December 2016

#### The Fragrance Shop needs to increase engagement

Figure 249: User profile of The Fragrance Shop, December 2016

#### Avon's tired brand image fails to attract young shoppers

Figure 250: User profile of Avon, December 2016

### Acqua & Sapone

#### What we think

#### Product assortment and widespread distribution

dm-drogerie markt's planned Italy launch will boost competition

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Online site rich in content, but missing out on online sales

Company background

Company performance

Figure 251: Acqua & Sapone: Estimated group sales performance, 2012-16

Figure 252: Acqua & Sapone: Estimated outlet data, 2012-16

Retail offering

### A. S. Watson (Europe)

What we think

Solid performance

Service

New outlets

Marionnaud

Company background

Marionnaud

Company performance

Figure 253: A. S. Watson (Europe): Group financial performance, 2011-15

Figure 254: A. S. Watson (Europe): Outlet data, 2011-15

Retail offering

Continental Europe

UK

### The Body Shop

What we think

Enrich Not Exploit

Skincare products driving sales

Maximising mobile opportunities

New UK store concept offering an enhanced beauty shopping experience

Company background

Company performance

Figure 255: The Body Shop: Retail and consolidated sales, 2011-15

Figure 256: The Body Shop: Estimated UK sales performance, 2011-15

Figure 257: The Body Shop: Estimated outlet data, 2011-15

Retail offering

### Clarel (Dia)

What we think

A good start

Where next

Company background

Company performance

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Figure 258: Dia: Group financial performance, 2011-15

Figure 259: Dia: Outlet data, 2011-15

Retail offering

### Debenhams

What we think

Relying on exclusivity to boost beauty sales

Providing beauty treatments could offer further opportunities to showcase products

Beauty Club generates loyalty and valuable data

Company background

Company performance

Figure 260: Debenhams: Group financial performance, 2011/12-2015/16

Figure 261: Debenhams: Outlet data, 2011/12-2015/16

Retail offering

### dm-drogerie markt

What we think

Renovating the store estate

Online development

Utilising social media to attract younger shoppers

Company background

Company performance

Figure 262: dm-drogerie markt: Group sales performance, excl tax, 2011/12-2015/16

Figure 263: dm-drogerie markt: Outlet data, 2011/12-2015/16

Retail offering

### Douglas Group

What we think

Perfumes and fragrances market under pressure

E-commerce growth

Private label expansion

Exclusive brands on the rise

New store formats

Growth through acquisitions and store openings

Professional beauty potential

Company background

Company performance

Figure 264: Douglas Group: Group financial performance, 2011/12-2015/16

Figure 265: Douglas Group: Outlet data, 2011/12-2015/16

Retail offering

### The Fragrance Shop

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)



## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

### What we think

- Personalised app to help choose the perfect scent
- Record sales driven by affordable on-trend scents
- New home delivery service to capitalise on last minute fragrance purchases
- Convenient on-the-move fragrance product boosts sales

### Company background

### Company performance

Figure 266: The Fragrance Shop: Group financial performance, 2011/12-2015/16

Figure 267: The Fragrance Shop: Outlet data, 2011/12-2015/16

### Retail offering

## House of Fraser

### What we think

- Senior management departures
- Beauty to be targeted in 2017

### Company background

### Company performance

Figure 268: House of Fraser Plc: Group financial performance, 2011/12-2015/16

Figure 269: House of Fraser Plc: Outlet data, 2011/12-2015/16

### Retail offering

## John Lewis

### What we think

- Scope to grow beauty revenues
- Stores rather than online underperforming in beauty category
- Spas help to create a virtuous circle

### Company background

### Company performance

Figure 270: John Lewis Plc (department store): Group financial performance, 2011/12-2015/16

Figure 271: John Lewis Plc (department store): Outlet data, 2011/12-2015/16

### Retail offering

## Kiko Milano

### What we think

- An authentic sensory in-store beauty shopping experience
- Professional make-up artists' recommendations bolster quality credentials
- New smart technology-led store aimed at Millennials

### Company background

### Company performance

Figure 272: Kiko Milano: Group sales performance, 2011-16

Figure 273: Kiko Milano: Estimated outlet data, 2011-16

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

Retail offering

### Lush Retail

What we think

Distinctive USP that resonates with the 50% of consumers looking for natural beauty products

Transparency and authenticity

Enhanced store experience

Targeting fresh growth opportunities

Building a global open-source platform to connect its growing online community

Company background

Company performance

Figure 274: Lush Retail Ltd: Group financial performance, 2010/11-2014/15

Figure 275: Lush Retail Ltd: Outlet data, 2010/11-2014/15

Retail offering

### Müller

What we think

More than a just a drugstore

Alnatura deal bolsters Müller's natural credentials

Everyday low prices to fight off competition from discounters

Multichannel offering

Company background

Company performance

Figure 276: Müller: Group sales performance, 2011/12-2015/16

Figure 277: Müller: Outlet data and estimated sales per outlet, 2011/12-2015/16

Retail offering

### Rossmann

What we think

Store development

Modernisation

E-commerce opportunities

The chance to make a quantum leap

Company background

Company performance

Figure 278: Rossmann: Group sales performance, 2012-16

Figure 279: Rossmann: Outlet data, 2012-16

Retail offering

### Sephora

What we think

Revolutionising the beauty shopping experience...

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)

## Beauty Retailing - Europe - January 2017

Report Price: £2895.00 | \$3570.11 | €3392.94

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

...store concepts

...virtual and augmented reality

...mobile

Beauty-to-go

A new way to shop Sephora

New social media reward and mobile messaging e-gifting scheme

Company background

Company performance

Figure 280: LVMH: Selective Retailing sales and estimated Sephora retail sales, 2011-15

Figure 281: Sephora: Outlet data, 2011-15

Retail offering

### Walgreens Boots Alliance

What we think

Growth is going to have to come from core retail operations

Strategy focusing on cost reduction and improving efficiency

Growth of online grocery shopping may be hurting Boots

A reason to visit

Boots to become less significant within Walgreens after Rite-Aid completion

Company background

Company performance

Figure 282: Walgreens Boots Alliance: Group financial performance, 2011/12-2015/16

Figure 283: Walgreens Boots Alliance: Outlet data, 2011/12-2015/16

Retail offering

### Yves Rocher

What we think

Natural beauty

Environmentally-friendly option

New app bridging the online and offline experience

New experienced-based retail concept rolled out across more stores

Company background

Company performance

Figure 284: Rocher Groupe: Estimated group sales performance, 2011-15

Figure 285: Rocher Groupe: Estimated outlet data, 2011-15

Retail offering

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://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](mailto:reports@mintel.com)