

## Beauty and Personal Care Retailing - Europe - January 2018

Report Price: £2895.00 | \$3909.12 | €3258.03

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“Retailing of beauty and personal care products is poised for change. It looks as if the mass market drugstores are approaching maturity in some countries while the retailers with the greatest potential are those with innovative own brands.”

– 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, focussing 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. Single country reports are also available for the UK, France, Germany, Italy and Spain.

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### DID YOU KNOW?

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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As part of Westfield London's 'Destination Beauty' event, M&S hosted a series of beauty masterclasses at its Westfield store throughout April and May. The five-minute classes were themed to give tips on a specific beauty topic including brows, lips, complexion and eyes. Brands and products used in demonstrations were also tailored to each different workshop, highlighting and promoting M&S' growing assortment of beauty names with advice from brands such as Rosie for Autograph, PIXI, Diego Dalla Palma and Stila. The workshops followed M&S' Beauty Discover event which ran from 27 March-26 April, with a series of free gifts available with purchase across a range of the retailer's beauty brands.

M&S' efforts to bolster awareness of its beauty ranges through in-store events aligns with Mintel Trend Return to the Experts, which discusses how retailers can differentiate themselves by offering customers expert advice. As more than a third (34%) of Millennial women (16-34s) are interested in attending in-store beauty masterclasses, such efforts have real potential to elevate M&S' position in the UK beauty sector.

M&S has also used seasonal events to drive awareness of its beauty ranges throughout the year, including its Mother's Day campaign which offered customers a free beauty box worth £80 when they spent £30 or more on beauty, make-up or skincare. For more information see M&S ups the ante on beauty with in-store events – 27th April 2017..

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Interest in male grooming continues to grow and in line with this trend, an increasing number of brands and retailers are putting more energy into capturing male consumers.

In July 2017, online youth fashion retailer ASOS began selling a selection of products from male make-up brand MMUK. This was followed by the news in November 2017 that MMUK, which currently only sells products online, is reportedly set to open its first bricks-and-mortar store in the UK.

In the run-up to Father's Day 2017, eBay teamed up with L'Oréal Men Expert to create an online men's grooming hub. The online shopping destination offered products across a number of categories, as well as articles and videos full of tips and how-to guides from skincare routines to beard trimming. As we discuss in Mintel's Seasonal Shopping (Spring/Summer) – UK, October 2017, Father's Day is worth an estimated £410 million to UK retailers, which makes it a significant opportunity for retailers to encourage sales of male-targeted BPC products. Mintel's Gifting in Beauty and Personal Care – UK, January 2018 RReport found that 75% of UK consumers have purchased beauty/personal care products as a gift in the last 12 months, with research for the same Report indicating that well-known brands appeal to such shoppers.

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## Acqua & Sapone

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Selex and Acqua e Sapone sign agreement

Online store still underdeveloped

Company background

### Company performance

Figure 293: Acqua & Sapone: estimated group sales performance, 2013-17

Figure 294: Acqua & Sapone: estimated outlet data, 2014-17

### Retail offering

## A. S. Watson (Europe) (Inc. Marionnaud)

### What we think

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## Following the UK

Discounting

Service

Online

Marionnaud

Where next

Company background

Company performance

Figure 295: A. S. Watson (Europe): group financial performance, 2012-16

Figure 296: A. S. Watson (Europe): outlet data, 2012-16

Marionnaud

Figure 297: Marionnaud France: financial performance, 2012-16

Retail offering

AS Watson in Europe

Figure 298: AS Watson: operating companies in Europe, 2017

Savers

The Perfume Shop

## The Body Shop

What we think

Distinct USP suffered under the weight of L'Oréal ownership

Mobile-first e-commerce platform roll-out

Shop-in-shop deal with El Corte Inglés an opportunity to attract more customers

Company background

Company performance

Figure 1: The Body Shop - Retail sales: Group financial performance, 2012-16

Figure 2: The Body Shop: Estimated UK sales performance, 2012-16

Figure 3: The Body Shop - Retail Sales: Estimated outlet data, 2012-16

Retail offering

## Clarel (Dia)

What we think

Clarel sales slow down

Own-brand range launched across Europe

Digital grows

Company background

Company performance

Figure 299: Dia: group financial performance, 2012-16

Figure 300: Dia: outlet data, 2012-16

Retail offering

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## Debenhams

### What we think

Debenhams Redesigned focuses on store experience

'Right sizing' of stores aims to improve profitability

Beauty at heart of Debenhams' future plans

Beauty Club relaunch aims to strengthen relationships with customers

Blow Ltd investment helps to scale up beauty services offer

Is online running out of steam?

What next?

Company background

Company performance

Figure 301: Debenhams: Group financial performance, 2012/13-2016/17

Figure 302: Debenhams: Outlet data, 2012/13-2016/17

Retail offering

## dm-Drogerie Markt

### What we think

Online

Stores and investment

Company background

Company performance

Figure 303: dm-Drogerie Markt: group sales performance, 2012/13-2016/17

Figure 304: dm-Drogerie Markt: outlet data, 2012/13-2016/17

Retail offering

## Douglas Group

### What we think

Strengthening market position in Spain and Italy

Transforming the online beauty shopping experience

Enhanced loyalty card to win new customers

In-store events to help drive footfall in German shops

Targeting men with new skincare products range and dedicated in-store spaces

Company background

Company performance

Figure 305: Douglas Group: group sales performance, 2012/13-2016/17

Figure 306: Douglas Group: estimated outlet data, 2012/13-2016/17

Retail offering

## The Fragrance Shop

### What we think

New try-before-you-buy fragrance subscription service

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Concession store partnership with House of Fraser

Customer feedback initiative helping drive sales

Company background

Company performance

Figure 1: The Fragrance Shop: Group financial performance, 2012/13-2016/17

Figure 2: The Fragrance Shop: Outlet data, 2012/13-2016/17

Retail offering

### House of Fraser

What we think

Beauty at the heart of sales growth

Online sales growth stutters at just the wrong time

Strong delivery proposition offers potential for differentiation

What next?

Company background

Company performance

Figure 307: House of Fraser Plc: Group financial performance, 2012/13-2016/17

Figure 308: House of Fraser Plc: Outlet data, 2012/13-2016/17

Retail offering

### John Lewis (department store)

What we think

New Oxford store points way to retail as theatre

Beauty to grow in importance

What next?

Company background

Company performance

Figure 309: John Lewis Plc (department store): Group financial performance, 2012/13-2016/17

Figure 310: John Lewis Plc (department store): Outlet data, 2012/13-2016/17

Retail offering

### Kiko Milano

What we think

20-year celebration leads to collaboration with Vogue Italia

KikoID opens in Milan

#kikotrendsetters

New CEO

Company background

Company performance

Figure 311: Kiko Milano, Group sales performance, 2012-17

Figure 312: Kiko Milano, estimated outlet data, 2012-17

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Retail offering

## Lush Retail

What we think

Bigger and better shops

New app and virtual shopping assistant to boost customer experience

Expanded payment option with Bitcoin digital currency

Company background

Company performance

Figure 1: Lush Retail Ltd: Group financial performance, 2012/13-2016/17

Figure 2: Lush Retail Ltd: Outlet data, 2012/13-2016/17

Retail offering

## Müller

What we think

Looking for sales growth opportunities outside Germany

Demand for natural cosmetics fuelling sales growth

Non-beauty offering dragging down total sales

Company background

Company performance

Figure 313: Müller: group sales performance, 2012/13-2016/17

Figure 314: Müller: outlet data and estimated sales per outlet, 2012/13-2016/17

Retail offering

## Rossmann

What we think

Expanding own brand and exclusives to give differentiation

Using influencers to increase appeal to younger buyers

Online proves a challenge

What next?

Company background

Company performance

Figure 315: Rossmann: Group sales performance, 2013-17

Figure 316: Rossmann: Outlet data, 2013-17

Retail offering

## Sephora

What we think

Rihanna's Fenty Beauty launched exclusively with Sephora

Mobile and digital offerings expanded

Small store format rolled out

New format introduced in Spain

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### German expansion

Company background

### Company performance

Figure 317: LVMH: Selective Retailing and estimated Sephora retail sales, 2012-17

Figure 318: Sephora: outlet data, 2012-16

### Retail offering

## Walgreens Boots Alliance

### What we think

A respected brand

NHS pressures represent an opportunity

Advantage loyalty card: time for a reboot?

Is Boots lacking parent company management focus?

Company background

### Company performance

Figure 319: Walgreens Boots Alliance: Group sales performance, 2012/13-2016/17

Figure 320: Walgreens Boots Alliance: Outlet data, 2012/13-2016/17

### Retail offering

## Yves Rocher

### What we think

Tapping into online marketplaces to reach out to more consumers in Asia

Enhanced digital presence strengthens multichannel proposition

Innovative one drop shower gel

Company background

### Company performance

Figure 321: Rocher Groupe: estimated group sales performance, 2013-17

Figure 322: Rocher Groupe: estimated outlet data, 2013-17

### Retail offering

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