

## Beauty and Personal Care Retailing - Spain - January 2020

Report Price: £995.00 | \$1343.55 | €1119.77

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



“Beauty and personal care specialists in Spain have been focusing on strengthening their ecommerce presence, but they continue to face strong competition from non-specialist retailers across the board.”

– **Armando Falcao, European Retail Analyst**

This report looks at the following areas:

- **Tech investments to improve guidance and the overall retail experience**
- **Gender-neutrality gains traction**

Retailers are turning their attention back to their stores to improve the multichannel shopping experience, hoping to entice consumers with new tech features while also satisfying their growing concerns about the environment and sustainability.

Our consumer research for this report shows that while Spanish beauty and personal care shoppers value retailers concerned about sustainability and which are actively trying to reduce their impact on the environment, they also place a lot of value on the experiential side of retail and we have seen a number of players invest heavily to provide guidance and improve the overall shopping experience.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://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 and Personal Care Retailing - Spain - January 2020

Report Price: £995.00 | \$1343.55 | €1119.77

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

## Table of Contents

### Overview

What you need to know  
Areas covered in this report

### Executive summary

The market

Consumer spending  
Figure 1: Spain: Annual % change in total consumer spending on beauty and personal care and total household spending, 2013-19

Sector size and forecast  
Figure 2: Spain: annual % change in retail sales, 2013-19

Inflation  
Figure 3: Spain: Consumer price inflation on personal care products and services, annual % change, 2013-19

Channels of distribution  
Figure 4: Spain: Estimated distribution of spending on beauty and personal care products by channel, 2018

Companies and brands

Key metrics

Market shares  
Figure 5: Spain: Leading BPC specialists' shares of all cosmetics and perfumery specialists' sales, 2019

Online

The consumer

Beauty and personal care products purchased  
Figure 6: Spain: Beauty and personal care products purchased in the last 12 months, November 2019

Online and in-store shopping for beauty and personal care products  
Figure 7: Spain: In-store and online buyers of beauty and personal care products, November 2019

Where beauty and personal care products are purchased  
Figure 8: Spain: Where beauty and personal care products were purchased, November 2019

Attitudes to shopping for beauty and personal care products  
Figure 9: Spain: Attitudes to buying beauty and personal care products, November 2019

What we think

### Issues and insights

Tech investments to improve guidance and the overall retail experience

The facts

The implications

Gender-neutrality gains traction

The facts

The implications

### The market – 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 and Personal Care Retailing - Spain - January 2020

Report Price: £995.00 | \$1343.55 | €1119.77

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

- Spending on personal care stagnates in 2018
- Fragrances and colour cosmetics grow the fastest
- Specialist retailers continue to face slow growth
- Inflation has stronger impact on services than on products
- Hypermarkets and supermarkets are the main channel of distribution

## Consumer spending

Figure 10: Spain: Consumer spending on beauty and personal care (incl. VAT), 2013-19

### Product market breakdown

Figure 11: Spain: Main beauty and personal care markets, spending (incl. VAT), 2013-19

Figure 12: Spain: Main beauty and personal care markets, forecast spending (incl. VAT), 2020-23

## Sector size and forecast

Figure 13: Spain: Health & beauty specialists, sales (excl. VAT), 2014-19

Figure 14: Spain: Health & beauty specialists, forecast sales (excl. VAT), 2020-24

## Inflation

Figure 15: Spain: Consumer prices of personal care items, annual % change, 2013-19

Figure 16: Spain: Consumer price inflation on personal care products and services, annual % change, January 2018 – November 2019

## Channels of distribution

Figure 17: Spain: Estimated distribution of spending on beauty & personal care products by channel, 2018

Figure 18: Spain: Estimated distribution of spending on beauty & personal care products by channel, 2014-18

## Companies and brands – What you need to know

- The period of consolidation carries on
- Clarel no longer for sale and drops from leadership position
- Considerable changes in market share
- Still scope for growth online

## Leading players

### Consolidation after acquisitions and change in market leadership

Figure 19: Spain: Leading beauty and personal care specialists, sales, 2016-19

Figure 20: Spain: Leading beauty and personal care specialists, outlets, 2016-19

Figure 21: Spain: Leading beauty and personal care specialists, sales per outlet, 2016-19

## Market shares

Figure 22: Spain: Leading specialists' shares of all cosmetics and perfumery specialists' sales, 2016-19

## Online

### Online activity

Figure 23: Spain: Broadband penetration as % of all households, 2008-19

### Shopping online

Figure 24: Spain: Online purchases in the last 12 months in key sectors, 2008-19

### Online BPC 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 and Personal Care Retailing - Spain - January 2020

Report Price: £995.00 | \$1343.55 | €1119.77

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

Figure 25: Spain: Estimated online sales by product category, 2018

Leading online players

Figure 26: Spain: Beauty retailers: transactional websites, December 2019

## The consumer – What you need to know

Consumption increases with age and remains highest among women

Around one-quarter shop for BPC online

Specialists are used mainly by younger consumers

Experiential retail and sustainability are key to success

## Beauty and personal care products purchased

Beauty and personal care widely used

Figure 27: Spain: Beauty and personal care products purchased in the last 12 months, November 2019

Haircare, beauty and skincare predominantly bought by women

Figure 28: Spain: Beauty and personal care products purchased in the last 12 months, by gender, November 2019

Age plays an important role for beauty and personal care products

Figure 29: Spain: Beauty and personal care products purchased in the last 12 months, by age group, November 2019

## Online and in-store shopping for BPC products

Spaniards continue to shop mainly in-store

Figure 30: Spain: In-store and online buyers of beauty and personal care products, November 2019

Women remain the predominant online shoppers

Figure 31: Spain: In-store and online buyers of beauty and personal care products, by gender, November 2019

Professionals and young families more likely to shop online

Figure 32: Spain: In-store and online buyers of beauty and personal care products, by age group, November 2019

## Where beauty and personal care products are purchased

Supermarkets/hypermarkets used by two thirds of consumers

Specialists fairly level in terms of usage

Figure 33: Spain: Where beauty and personal care products were purchased, November 2019

Customer profiles

Figure 34: Spain: Where beauty and personal care products were purchased, by age and income, November 2019

Where people shopped and what they bought

Figure 35: Spain: Beauty and personal care products purchased by retailer used: specialists, November 2019

Figure 36: Spain: BPC products purchased by retailer used: non-specialists, November 2019

Men and women both shop around

Figure 37: Spain: Repertoire of where they purchased beauty and personal care items in the last 12 months, by gender, November 2019

Figure 38: Spain: Repertoire of where they purchased beauty and personal care items in the last 12 months, by age group, November 2019

## Attitudes to shopping for beauty and personal care products

Experiential retail and sustainability are key to success

Figure 39: Spain: Attitudes to shopping for BPC products and BPC retailers, November 2019

Clarel and Sephora shoppers are particularly interested in the retail 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 and Personal Care Retailing - Spain - January 2020

Report Price: £995.00 | \$1343.55 | €1119.77

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

Figure 40: Spain: Attitudes to shopping for BPC products and BPC retailers by where they shopped for BPC products in the last 12 months: specialists, November 2019

El Corte Inglés shoppers are the most concerned with sustainability

Figure 41: Spain: Attitudes to shopping for BPC products and BPC retailers by where they shopped for BPC products in the last 12 months: non-specialists, November 2019

## Appendix – Data sources, abbreviations and supporting information

Abbreviations

Data sources

### Douglas Group

What we think

Expanded online beauty offering with marketplace proposition

Strengthening its position in the luxury cosmetic sector

Store makeovers offering expanded services and innovative experiences

Beauty-on-demand

Tapping into the 'clean' beauty trend

Company background

Company performance

Figure 42: Douglas Group: group sales performance, 2014/15-2018/19

Figure 43: Douglas Group: Store data, September 2018

Figure 44: Douglas Group: Outlet data, 2014/15-2018/19

Retail offering

### Kiko Milano

What we think

Brand new store concept and personalised lipstick

More store traffic means more opportunities for sales

Shifting physical expansion eastwards

Targeting a bigger share of the online beauty market

Company background

Company performance

Figure 45: Kiko Milano: Estimated group financial performance, 2014-18

Figure 46: Kiko Milano: Estimated outlet data, 2014-18

Retail offering

### Sephora

What we think

Hyper personalised in-store experience

Transforming the at-home beauty experience

A more transparent beauty shopping experience

Tapping into the embryonic cannabis-infused beauty market

Innovative new beauty products

Loyalty-driven credit card and enhanced Beauty Insider perks for frequent shoppers

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 and Personal Care Retailing - Spain - January 2020

Report Price: £995.00 | \$1343.55 | €1119.77

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

Company background

Company performance

Figure 47: Sephora: group sales performance, 2014-18

Figure 48: Sephora: Estimated outlet data, 2014-18

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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)