

## Beauty and Personal Care Retailing - Italy - 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.



“Consumer spending on beauty and personal care in Italy has been rising for the past six years but has seen a slowdown in the past two years, with retail sales stagnating in 2018. Nevertheless, the leading specialists have continued to outperform the market.”

– **Armando Falcao, European Retail Analyst**

This report looks at the following areas:

- **In-store experience is key to success**
- **Interest in sustainability continues and extends to packaging**

In our consumer research carried out for last year's report, we saw that Italian consumers are sensitive to price and we believe this continues to be a driver in the country. However, we have seen demand for more sustainable products and packaging coming more to the fore in 2019. We expect these issues to influence how the market develops throughout the course of 2020.

Although Italians appear to remain sensitive to price, both specialists and non-specialists have been showing a stronger focus on sustainability, simplicity and experiential retail in an attempt to remain competitive.

**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 - Italy - 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: Italy: Annual % change in total consumer spending on beauty and personal care and total household spending, 2013-19  
Sector size and forecast  
Figure 2: Italy: annual % change in retail sales, 2013-19  
Inflation  
Figure 3: Italy: Consumer price inflation on personal care products and services, annual % change, 2013-19  
Channels of distribution  
Figure 4: Italy: Estimated distribution of spending on beauty and personal care products by channel, 2019  
Companies and brands  
Key metrics  
Market shares  
Figure 5: Italy: Leading BPC specialists' estimated share of all spending on beauty and personal care, 2019  
Online  
The consumer  
Beauty and personal care products purchased  
Figure 6: Italy: 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: Italy: In-store and online buyers of beauty and personal care products, November 2019  
Where beauty and personal care products are purchased  
Figure 8: Italy: Where beauty and personal care products where purchased, November 2019  
Attitudes to shopping for beauty and personal care products  
Figure 9: Italy: Attitudes to buying beauty and personal care products, November 2019  
What we think

### Issues and insights

In-store experience is key to success  
The facts  
The implications  
Interest in sustainability continues and extends to packaging  
The facts  
The implications

### The market – What you need to know

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)

# Beauty and Personal Care Retailing - Italy - 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 slows down in 2018 and 2019  
Facial skincare leads in sales but fragrances have grown the fastest  
Health and beauty specialists' sales remain stagnant  
Unchanged inflation for personal care services and deflation for products  
Hypermarkets and supermarkets are main channel of distribution

## Consumer spending

Figure 10: Italy: Consumer spending on beauty and personal care (incl. VAT), 2014-19

### Product market breakdown

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

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

## Sector size and forecast

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

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

## Inflation

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

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

## Channels of distribution

Figure 17: Italy: Estimated distribution of spending on beauty & personal care products by channel, 2019

Figure 18: Italy: Estimated distribution of spending on beauty and personal care products by channel, 2014-19

## Companies and brands – What you need to know

In spite of stagnation, leading players continue to grow  
Acqua & Sapone remains leader but Tigotà is gaining ground  
Larger players outperforming smaller regional chains  
Online sales still have room to grow

## Leading players

Leading players continue to grow despite stagnant consumer spending

Figure 19: Italy: Leading beauty and personal care specialists, sales, 2015-19

Store network expansion slows down further

Figure 20: Italy: Leading beauty and personal care specialists, outlets, 2015-19

Figure 21: Italy: Leading beauty and personal care specialists, sales per outlet, 2015-19

## Market shares

Figure 22: Italy: Leading BPC specialists' estimated share of all spending on beauty and personal care, 2019

Figure 23: Italy: Leading BPC specialists' estimated share of all spending on beauty and personal care, 2015-2019

## Online

Online activity

Figure 24: Italy: Broadband penetration as % of all households, 2008-19

Shopping online

**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)

# Beauty and Personal Care Retailing - Italy - 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: Italy: Online purchases in the last 12 months in key sectors, 2008-19

Online BPC sales

Figure 26: Italy: Estimated online sales by product category, 2018

Leading online players

Figure 27: Italy: Beauty retailers: transactional websites, December 2019

## The consumer – What you need to know

BPC purchasing is highest among women and increases with age

Online growing but more popular with women

Pharmacies are used by the oldest and most affluent consumers

Italians are concerned with the environment and value the in-store experience

## Beauty and personal care products purchased

Beauty and personal care remain universal product categories

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

Women are the main buyers of haircare, beauty and skincare

Figure 29: Italy: Beauty and personal care products purchased in the last 12 months, by gender, November 2019

Age and gender of buyers vary considerably across product categories

Figure 30: Italy: Beauty and personal care products purchased in the last 12 months, by age group and gender, November 2019

## Online and in-store shopping for beauty and personal care products

Italians continue to shop mainly in-store

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

Women are more likely to shop online

Figure 32: Italy: In-store and online buyers of beauty and personal care products, by gender, November 2019

Online shopping appeals to professionals and young families

Figure 33: Italy: In-store and online buyers of beauty and personal care products, by age group, November 2019

## Where beauty and personal care products are purchased

Specialists used by nearly three-quarters of consumers

Figure 34: Italy: Where beauty and personal care products were purchased, October 2018 and November 2019

Customer profiles

Figure 35: Italy: Where beauty and personal care products were purchased, by age and income, November 2019

Where people shopped and what they bought

Figure 36: Italy: Beauty and personal care products purchased by retailer used: beauty specialists, November 2019

Figure 37: Italy: BPC products purchased by retailer used: non-specialists, November 2019

Women shop around the most

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

Figure 39: Italy: 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

Consumers enjoy shopping experience and are concerned with the environment

Opportunity for masstige brands

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)

# Beauty and Personal Care Retailing - Italy - 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.

## Brand loyalty is lower among Italians

Figure 40: Italy: Attitudes to shopping for BPC products and BPC retailers, November 2019

## Kiko and Sephora shoppers value the in-store experience the most

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

## Pharmacy and Amazon shoppers are the most concerned with sustainability

Figure 42: Italy: 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 43: Douglas Group: group sales performance, 2014/15-2018/19

Figure 44: Douglas Group: Store data, September 2018

Figure 45: 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 46: Kiko Milano: Estimated group financial performance, 2014-18

Figure 47: 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

**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)

## Beauty and Personal Care Retailing - Italy - 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.

---

Tapping into the embryonic cannabis-infused beauty market

Innovative new beauty products

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

Company background

Company performance

Figure 48: Sephora: group sales performance, 2014-18

Figure 49: 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)