

# Beauty & Personal Care Retailing - Italy - 2023

Report Price: £1095 | \$1495 | €1295

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

## This report looks at the following areas:

- The impact of the cost of living crisis on the beauty and personal care sector and how savvy shopping consumers are adapting
- Channels used to shop for beauty and personal care goods and which retailers they use
- Key strategies adopted by consumers to cut back on beauty and personal care spending during the cost of living crisis
- Attitudes of beauty and personal care shoppers towards areas of innovations among retailers.

The sales of specialist beauty and personal care retailers held up remarkably well during 2021 and 2022, as the cost of living crisis began to bite. While we've seen real-terms declines in spending on food and drink, the beauty and personal care sector has continued to grow in real terms, reflecting the importance consumers continue to place on their appearance.

Not only have shoppers' finances been impacted by the general increase in prices in Italy (driven mostly by energy price rises), prices of personal care goods and services continue to rise into 2023 and show little sign of plateauing at the moment. As a result, shoppers are becoming more savvy, shopping around for discounts, comparing prices, using less of products and switching to cheaper products.

Amazon has a consumer penetration level for beauty and personal care products equal to that of the market-leading specialist, Acqua e Sapone. If specialist retailers (and particularly those with large store-based estates) are going to remain relevant to shoppers in the future, they are going to have to give them a more compelling reason to visit stores instead of buying online.

With shoppers so price-conscious, retailers have an opportunity to tempt them with discounts and special deals only available to members of their loyalty schemes, in the way we have seen in the grocery sector, as a way of stopping



"The major chains of specialist beauty and personal care retailers, which are still primarily store-based businesses, have an opportunity to help their customers deal with the cost of living crisis by using discounts to build goodwill and increase loyalty which will bear fruit in the future."

- Michael Oliver, Senior Retail Analyst

## Buy this report now

Visit	store.mintel.com
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

## Beauty & Personal Care Retailing - Italy - 2023

Report Price: £1095 | \$1495 | €1295

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

the 'cherry picking' of deals from different retailers. This could also help to concentrate more sales among those retailers with loyalty schemes and offset the hit to margins from the discounting through increased sales volumes.

MINTEL

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

## Table of Contents

### OVERVIEW

- **Key issues covered in this Report**
- **Market context**
- **Areas covered in this Report**

### EXECUTIVE SUMMARY

- **The five-year outlook for BPC retailing**  
Figure 1: Italy: beauty and personal care retailing outlook, 2023-28
- **The market**
- **Consumer spending**  
Figure 2: Italy: trends in total consumer spending and consumer spending on personal care goods and services, 2017-22
- **Retail sector size and forecast**  
Figure 3: Italy: Trends in beauty and personal care specialists' sales vs all retail sales, 2017-22
- **Channels to market**  
Figure 4: Italy: where beauty and personal care products have been bought in-store or online in last 12 months, 2022
- **The consumer**
- **Purchasing of beauty and personal care products**  
Figure 5: Italy: beauty and personal care products purchased in the last 12 months by detailed product category, 2022
- **Channels used to purchase BPC products**  
Figure 6: Italy: channels used to purchase beauty and personal care products, 2022
- **Retailers shopped at**  
Figure 7: Italy: retailers shopped at for beauty and personal care products in-store or online in the last 12 months, 2022
- **Cost-saving strategies**  
Figure 8: Italy: how consumers would cut back on beauty and personal care spending, 2022
- **Attitudes towards innovations in BPC products and retailing**  
Figure 9: Italy: attitudes towards beauty and personal care products and retailing, 2022
- **Companies and brands**
- **Leading players**
- **Market shares**  
Figure 10: Italy: leading beauty and personal care specialists' shares of all personal care spending, 2021
- **Online**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

ISSUES AND INSIGHTS

- How will the cost of living crisis impact on beauty and personal care retailers in 2023 and how can they respond?
- Help customers now, benefit later
- Short-term discounts are popular...
- ... as are bigger value packs
- The bulk-buy opportunity
- The refill opportunity
- Discounts should be tied to loyalty schemes for maximum benefit
- Flexible payments can help to smooth out customer cash flows
- How can beauty and personal care retailers capitalise on the increased focus on sustainability to boost their revenues?
- Sustainability is not going to go away
- The packaging return opportunity
- The refill opportunity
- Better transparency/labelling can act as a driver
- Second-hand not such a big opportunity but still some potential
- Online needs to play its part too

THE MARKET

- **Market size and performance**  
Figure 11: ITALY: CONSUMER SPENDING ON BEAUTY AND PERSONAL CARE (INCLUDING VAT), 2017-22
- **Retail sector size and forecast**  
Figure 12: Italy: beauty and personal care retailers' sales (excluding VAT), 2017-24
- **Channels to market**
- **Online is biggest gainer from pandemic**  
Figure 13: Italy: where beauty and personal care products have been bought in-store or online in last 12 months, 2022

MARKET DRIVERS

- **The economy**  
Figure 14: Italy: key economic indicators, % annual change, 2021-24
- **Inflation**  
Figure 15: Italy: consumer prices\* of personal care items, annual % change, 2017-22

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

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

Figure 16: Italy: monthly consumer price inflation\* trends for personal care products and services, annual % change, 2021-23

- **Consumer confidence starts to recover again**

Figure 17: ITALY: TRENDS IN LEVELS OF CONSUMER CONFIDENCE\*, 2022-23

- **The impact of the cost of living crisis**
- **Italian consumers' financial situation**

Figure 18: Italy: financial situation of Italian consumers, 2022-23

Figure 19: Italy: consumers' financial situation compared to a year ago, 2023

Figure 20: Italy: consumers' expectations of their financial situation in the next year, 2023

- **Which cost of living pressures have Italian consumers been experiencing?**

Figure 21: Italy: issues affecting Italian consumers in the past two months, 2023

Figure 22: Italy: expected responses to rising prices, 2023

- **The impact of the cost of living crisis on giving beauty and toiletries as gifts**

Figure 23: Italy: spending over Christmas 2022 period compared to usual Christmas spending on beauty products and toiletries as gifts, 2023

- **Beauty trends**
- **Beauty spending**

Figure 24: Italy: trends in spending on beauty products and toiletries\*, 2019-23

Figure 25: Italy: beauty and grooming behaviours in last 3 months, 2022-23

- **The growth of the online channel**

Figure 26: Italy: factors to drive online beauty/grooming purchases, 2022

- **Diversity, equity and inclusivity**

Figure 27: Italy: self-described skin tones, 2022

Figure 28: Italy: self-described hair type, 2022

Figure 29: Italy: Diversity and inclusion factors that drive beauty/grooming brand choices, 2022

Figure 30: Italy: beauty/grooming retailer responsibilities relating to diversity and inclusion, 2022

- **Sustainability**

Figure 31: Italy: attitudes to sustainability issues, impacts and responsibilities, 2022

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

Figure 32: Italy: sustainable behaviours in the last 12 months, 2022

Figure 33: Italy: important factors when choosing beauty/grooming products, 2022

Figure 34: Italy: marketing information that would encourage people to buy sustainable products, 2022

- **Attitudes to beauty**

Figure 35: Italy: attitudes to beauty, 2023

## PURCHASING OF BEAUTY AND PERSONAL CARE PRODUCTS

Figure 36: Italy: beauty and personal care products purchased in past 12 months by broad product category (nets), 2022

Figure 37: Italy: beauty and personal care products purchased in past 12 months by detailed product category, 2022

- **Product demographics**

## CHANNELS USED TO PURCHASE BPC PRODUCTS

Figure 38: Italy: channels used to purchase beauty and personal care products, 2022

- **Channel demographics**
- **Channel combinations**

Figure 39: Italy: combinations of channels used to purchase beauty and personal care products, 2022

- **Products purchased by channels used**

Figure 40: Italy: beauty and personal care products purchased in past 12 months by detailed product category, by channels used to purchase beauty and personal care products, 2022

## RETAILERS SHOPPED AT FOR BEAUTY AND PERSONAL CARE PRODUCTS

Figure 41: Italy: retailers shopped at for beauty and personal care products in-store or online in the last 12 months, 2022

- **Specialist retailer demographics**

Figure 42: Italy: retailers shopped at for beauty and personal care products in-store or online in the last 12 months, by gender and age group, 2022

- **Retailer strengths and weaknesses by channel**

Figure 43: Italy: retailers shopped at for beauty and personal care products in-store or online in the last 12 months, by channels used to purchase beauty and personal care products, 2022

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

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

- Retailer strengths and weaknesses by product**

Figure 44: Italy: beauty and personal care products purchased in past 12 months by detailed product category, by retailers shopped at for beauty and personal care products in-store or online in the last 12 months, 2022

- Retailer overlap**

Figure 45: Italy: retailers shopped at for beauty and personal care products in-store or online in the last 12 months, by retailers shopped at for beauty and personal care products in-store or online in the last 12 months, 2022

## HOW CONSUMERS WOULD CUT BACK ON BPC PRODUCT SPENDING

Figure 46: Italy: how consumers would cut back on beauty and personal care spending, 2022

- Cost-saving strategy demographics**

Figure 47: Italy: how consumers would cut back on beauty and personal care spending, by gender and age, 2022

- Cost-saving preferences by specialist retailer shopped at**

Figure 48: Italy: how consumers would cut back on beauty and personal care spending, by specialist retailers shopped at for beauty and personal care products in-store or online in the last 12 months, 2022

## ATTITUDES TOWARDS INNOVATIONS IN BPC PRODUCTS AND RETAILING

- Strong support for rewarding return of empty packaging**

- Shoppers would like to see premium brands from more retailers**

- Online plays vital role for demonstrations and reviews**

- One-third of shoppers believe value brands are as effective as premium ones**

Figure 49: Italy: attitudes towards beauty and personal care products and retailing, 2022

- Attitudes by specialist retailer shopped at**

Figure 50: Italy: attitudes towards beauty and personal care products and retailing, by specialist retailers shopped at for beauty and personal care products in-store or online in the last 12 months, 2022

## COMPANIES AND BRANDS

- HIG aims to overhaul and enhance efficiency of Acqua e Sapone**

- Tigotà consolidates second position**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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



# Beauty & Personal Care Retailing - Italy - 2023



Report Price: £1095 | \$1495 | €1295

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

- **Douglas leads second tier**
- **Other players**

Figure 51: ITALY: LEADING BEAUTY SPECIALISTS, SALES, 2017-21

Figure 52: ITALY: LEADING BEAUTY SPECIALISTS, OUTLETS, 2017-21

## MARKET SHARES

Figure 53: Italy: Leading beauty specialists: Shares of spending on BPC goods, 2017-21

## ONLINE

- **Online activity**
- **Online BPC sales**
- **Leading online players**
- **Douglas grows online contribution**
- **Notino is the leading online-only player**
- **Sephora stands out among omnichannel retailers**

Figure 54: ITALY: SEARCH INTEREST ON GOOGLE, SELECTED BPC RETAILERS, LAST 12 MONTHS, 2022-23

## APPENDIX: RESEARCH METHODOLOGY, DATA SOURCES AND ABBREVIATIONS

- **Abbreviations**
- **Consumer research methodology**
- **Data sources**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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





## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.