



March 2024

## **COSMETICS BY NUMBERS**

The preliminary figures relative to the Italian cosmetics industry at the end of the 2023 financial year are being published, as usual, on the occasion of the Cosmoprof in Bologna, which has now reached its 55th edition. In line with the advance information already contained in the conjunctural report published in February, statistics pertaining to the market and to the turnover achieved by Italian firms now confirm that pre-Covid levels have been surpassed, despite the existence of a particularly critical background situation, which included the continuation throughout 2023 of the conflict between Russia and Ukraine, which must be seen in the context of a severe energy crisis, strongly conditioned by the costs and supplies of raw materials, and the repercussions of the crisis between Israel and Palestine. Despite the presence of these unfavourable conditions for economic growth, this confirms the cosmetics industry's inelastic nature, as a consequence of the fact that it has maintained the level of its turnover, especially in international markets, and of the growth in the domestic market for products that lose none of their dynamics once they have become part of consumers' everyday habits, but actually record positive rates of growth.

The industry completed the 2023 financial year with a turnover in excess of €15,140 million, achieving a growth rate of 13.8%, while exports confirmed its important dynamic potential, topping €7,000 million in value and increasing by 20.2% over the previous year. The industry's impact on the country's balance of trade in 2023 was significant, abundantly surpassing the pre-crisis level at €4,000 million by diversifying the industry's target markets and confirming turnovers in countries that have been constant partners for more than 25 years. Levels of production were once again impacted by the partial absorption of inflation, caused by the increases in raw material costs, which had repercussions along the entire value chain.

Turning now to the domestic market, the return of perfume shops to their status as the second most important channel of cosmetics sales is confirmed, as is the constant growth of online sales, now in double figures: buying habits after the long period of cohabitation with the pandemic underscore the consolidation of the 'onlife' and multi-channel strategies adopted by many brands. The Italian market completed 2023 with a value of more than €12,500 million, up by 9.4% over the previous year. Phenomena such as single-brand stores, specialised drugstores, e-commerce and the elimination of commercial middlemen that reduces the numbers of intermediaries are now practised by many firms, rationalising the frequency of passages in distribution and pushing the boundaries of our analyses.

Distribution channels are still conditioned to a significant extent by the increase in energy prices, although the rate of inflation recorded in the cosmetics industry indicates an increase of approximately 7% in across-the-counter prices, substantially lower than the average increases in consumer good prices, which recent projections by the Italian Statistics Institute ISTAT report as topping 10%.



## THE ITALIAN COSMETICS INDUSTRY TURNOVER

In 2023, the overall turnover of the Italian cosmetics industry, in other words the value of its total production, ended the year at something more than €15,140 million, an increase of 13.8% over the previous financial year. Sell-in values increased in all channels in Italy's domestic market, with important results being achieved in professional channels, as a result of the positive, albeit delayed, revival brought about when hairdressing and beauty salons reopened after the lockdown.

Exports had a positive impact on the value of turnover, achieving a level of more than €7,000 million and a growth rate of 20.2%, clocking up important returns in traditional markets, in particular the USA, and encouraging progress in new destinations. Our prudence with regard to some evaluations and to medium-term estimates is suggested by the international economic scenario. This is aggravated by the tension of the conflicts currently taking place, which have obviously also had an impact on the cosmetic industry value chain, generating a spiral of price increases upstream of the industry, elements that have intensified entrepreneurs' concerns about production costs and, as a consequence, their margins.

While the cosmetics industry has been capable of withstanding the negative cycle of the last two years, there remains the question of the extent to which it will be possible to continue containing margins, although the prospects of recuperation and growth, in addition to the partial revival of entrepreneurs' policy of exploring new foreign markets and consumption targets, suggest that cautious optimism is in order. In the light of these considerations, in fact, cosmetic industry turnover forecasts for 2024 estimate an increase of 9.8%, abundantly surpassing pre-crisis values.

### Evolution of the Italian cosmetics industry turnover

	<b>Value 2022</b>	<b>Preliminary 2023</b>	<b>% variation 23-22</b>	<b>% forecast 24-23</b>
<b>Turnover in Italy</b>	<b>7,450</b>	<b>8,101</b>	<b>8.7</b>	<b>7.8</b>
<i>of which generated in:</i>				
<i>Traditional &amp; digital channels</i>	6,732	7,349	9.2	8.2
<i>Professional channels</i>	718	752	4.7	4.8
<b>Exports</b>	<b>5,859</b>	<b>7,041</b>	<b>20.2</b>	<b>12.0</b>
<b>Total turnover of Italian cosmetics industry</b>	<b>13,309</b>	<b>15,142</b>	<b>13.8</b>	<b>9.8</b>
<i>of which generated by contracts manufacturers</i>	1,810	1,975	9.1	7.5

Data processed by Cosmetica Italia Statistics Dept. Values in million Euros and change from previous period.

Turning to look at foreign markets, the sustained revival of international trade on the part of Italian cosmetics firms is confirmed. One consequence of the industry's excellent export performance is that Italy's balance of trade has exceeded its pre-Covid values, reaching approximately €4,000 million. Short-term export growth estimates also confirm the Italian industry's competitive edge, leading to projections of 12.0% growth by the end of the 2024 financial year.

The Italian cosmetics industry has reiterated its reputation in the world by highlighting and confirming the sector's strong points: investments in innovation, the quality of its products and the qualifications and training of its human resources, all elements that enable it to hold its place and maintain a competitive edge in the market. The major issue of the increase in costs is the focus of the study centre's latest investigations, which have been aimed at measuring impacts on the turnover of enterprises operating in the cosmetics sector.

Taken as a whole, this increase has had an impact of more than 15% on cosmetic products, with cost components specific to the identikit of cosmetics enterprises. If we consider production companies, the impact on their turnover of cosmetic raw materials and packaging is in the order of 18%, while the increase deriving from the transformation and production of cosmetics accounts for just over 11%; businesses oriented towards trade and distribution are more exposed to increases in the costs of logistics, which are running at more than 10%. Although it slowed down in the course of 2023, the increase in energy costs is a primary impact, although one that is now lessening to a certain extent.

These margins are absorbed by more than 70% of the cosmetics firms interviewed, while the remaining 30% state that they suffer downstream repercussions. The impact that can be offloaded onto the final off-the-shelf price is therefore still only marginal, less than the average domestic consumer's weekly shopping bill. In addition, more than half the businesses operating in the cosmetics sector are in search of new sources of supply, while one in three is launching projects to achieve energy independence, reacting to the National Recuperation and Resilience Plan that will probably facilitate such conversions.

As always, at the root of this adaptation is investment in research and development: despite the tensions at large in the scenario, the sector has not focused on purchase drivers based on the price lever, but has preferred to maintain its rate of innovation, with continuity and strategic vision, so as to keep the standard of its ranges on offer high. E-commerce and digital activities, together with the increased attention now being paid to sustainability, emerge as additional strong points, as do the assortment and the combination of the two competitive levers mentioned before: knowledge of the customer base and innovation. In fact, e-commerce became an obligatory strategy during the long periods of lockdown, stimulating those cosmetic firms that had not yet adapted to online sales and generating substantial acceleration in the process of digitalisation.

Outsourcing in the cosmetics industry in Italy closed the 2023 financial year with a turnover of €1,975 million and a growth of 9.1% over the previous year. Estimates for 2024 indicate further growth, albeit with a degree of caution, of some 7.5%: costs of raw materials procurement, caused by the severe drought in 2023, as well as the increase in transportation costs, both naval and aerial, also make their presence felt upstream of the industry chain.



## IMPORTS AND EXPORTS

Italy's cosmetics exports increased in 2023 by 20.2% over the previous year, achieving a total value, in preliminary end-of-year records, of more than €7.0 billion and confirming the industry double-figure export growth rates characteristic of the fundamental contribution to the increase in the cosmetics industry's total turnover in Italy.

The news is also positive with respect to the level of concentration in the top ten markets in value terms for Italian cosmetics exports, with the exception of the Netherlands, which account for slightly less than 63% of the total, redistributing the value going to markets other than consolidated commercial partners by just over 4%.

An interpretation of the period from 2019 to 2023 indicates a vigorous evolution in exports, despite the fact that the last two years suffered an increase in prices caused by the difficulty encountered by firms in procuring raw materials, to which both the 2023 drought and the rise in air transportation costs contributed.

### Top 10 of the Italian cosmetics exports

	Value 2023	% variation 23-22
United States	962.2	31.8%
France	703.7	12.6%
Germany	700.3	32.2%
Spain	423.9	24.8%
UK	372.2	19.8%
Poland	307.4	20.5%
EAU	254.8	12.9%
Hong Kong	250.4	11.2%
The Netherlands	249.5	-6.6%
Russia	183.3	48.1%

*Istat data processed by Cosmetica Italia Statistics Dept. Values in million Euros and change from previous period.*

Going into detail now to look at individual countries, Italy's most faithful partners are once again paying attention to cosmetics Made in Italy: on their own, the United States (up by 31.8%), France (up by 12.6%) and Germany (up by 32.2%) absorb Italian cosmetics exports worth more than €2.3 billion. Yet the United States were not the only destination outside the European Union that marked up an increase in exports in double figures: the same applies to the United Kingdom (up by 19.8%), the United Arab Emirates (up by 12.9%) and Hong Kong (up by 11.2%), analysing only the top ten markets for Italian cosmetics exports.





To go into more detail about product families, there was across-the-board growth, with more substantial performance in the categories that were more penalised during the Covid crisis: important growth was achieved by the alcohol-based perfume sector (up by 36.5%), which constitutes the first product family by both weight and value. This is followed by skin care, the second category, up by 21.1% over 2022. The first two product families account for more than half of all Italian cosmetics exports, with a value of €3.6 billion. In terms of growth dynamics, make-up products come next, increasing by 16% to a value of €1.1 billion.

### Composition of the Italian cosmetics exports by categories

	Value 2023	% variation 23-22
Fragrances	2,024	36.5%
Skin care	1,605	21.1%
Hair care	1,399	8.5%
Make-up	1,105	16.0%
Body hygiene	368	5.5%
Oral hygiene	291	20.2%
Products for men	46	12.9%
<i>Other cosmetics</i>	203	15.1%
<b>Total exports</b>	<b>7,041</b>	<b>20.2%</b>

*Istat data processed by Cosmetica Italia Statistics Dept. Values in million Euros and change from previous period.*

Imports also performed extremely well, driven above all by products for body care (up by 11.5%) and alcohol-based perfume products (up by 1.4%). These two categories account for more than 60% of total Italian cosmetics imports.

Alcohol-based perfume products and haircare products recorded higher balances of trade than other cosmetic categories, at €1.3 billion and €1.0 billion respectively, demonstrating the high degree of specialisation and competitive edge of cosmetic firms in world markets.





## THE MARKET: DISTRIBUTION CHANNELS

By the end of the 2023 financial year, the cosmetics market in Italy had renewed its model of distribution, abundantly overcoming the conditions that had emerged after the crisis. The alterations and accelerations experienced in sales of cosmetic products derive from new buying and consumption habits that generated a value of more than €12,500 million and a growth of 9.4% compared to the 2022 financial year. Despite the presence of economic and political factors of influence, with severe impacts on levels of inflation, estimates for 2024 can be projected with positive values, in excess of €13,500 million and up by 8.4%, as a result of Italian consumers' well-established habits.

The analysis proposed for interpreting the trend in consumption of cosmetic products in the channels of distribution includes the trend in the period from 2019 to 2021, as well as the short-term trend, considering the rapidly evolving political and economic scenario at the moment at world level.

This phase of expansion in expenditure on the part of Italians was due, especially in the first half of 2023, to inflation in cosmetics prices, which was scaled down significantly at the end of 2023, as well as to the broadening concept of wellness deriving from the creation and the satisfaction of buying a cosmetic product.

In fact, the ritual nature of cosmetics consumption, accompanied by new experiential models in points of sale, improves consumers' brand commitment, as well as generating complete confidence in and identification with the values narrated by firms. Corporate storytelling has become a strategic tool that plays a crucial role in strengthening communications about such issues as sustainability.

### Value of the Italian cosmetics market by distribution channels

	<b>Value 2022</b>	<b>Preliminary 2023</b>	<b>% variation 23-22</b>	<b>% forecast 24-23</b>
Mass market	4,819	5,217	8.3%	7.8%
Perfume shops	2,217	2,532	14.2%	11.4%
Pharmacies	1,951	2,098	7.5%	7.2%
E-Commerce	988	1,111	12.5%	10.1%
Hairdressing salons	561	589	5.0%	5.5%
Herbalist shops	378	423	12.0%	10.5%
Direct sales	348	352	1.1%	1.0%
Beauty salons	196	207	5.3%	4.1%
<b>Italian cosmetics market</b>	<b>11,458</b>	<b>12,530</b>	<b>9.4%</b>	<b>8.4%</b>

*Data processed by Cosmetica Italia Statistics Dept. Values in million Euros and change from previous period.*

More specifically, sales of cosmetics through the **pharmacies** consolidated the trend already witnessed in the period before Covid, increasing by 7.5% in 2023 over the previous financial year to a value of nearly €2,100 million. The change, compared to 2019, is found in the degree of specialisation, which was reinforced by the end of 2023 in favour of products for facial and body care, to the detriment of make-up products. Personal hygiene products lost some of the market share they had gained during the long periods of lockdown, despite achieving purchase values in excess of €530 million and being driven primarily by products for body hygiene (up by 4% from 2022 to 2023). Projections for 2024 point towards further growth of 7.2% for this channel, despite the fact that the first indications of the year 2024 chalked up a slight contraction in sales volumes.

Sales through the **herbalist shop** channel showed a positive trend for the 2023 financial year compared to 2022, achieving a total value of slightly more than €423 million, as the recuperation of pre-Covid values moved to 2023. While market values remain slightly less than those of 2019, they now confirm a substantial revival after more than three years of crisis, aided by the remodulation of product ranges and new positioning strategies practised by the firms operating in this channel. In terms of the channel's coverage, sales through herbalist shops accounted for 3.4% of total cosmetic consumption in Italy: the loss of the channel's market share, compared to its 4.1% before the pandemic started, is probably a consequence of the broader interest in sustainable and natural-origin cosmetics that is now found across several channels of distribution, harming the identity of the traditional formulae of the herbalist shop, which has been suffering for years.

At the end of the 2023 financial year, the **perfume shops** confirmed one of the most dynamic increases among the traditional channels, growing by 14.2%, the result of a positive surge following the contraction experienced in the course of 2020 and 2021. With a volume of sales of more than €2,500 million, perfume shops are once again the second channel of choice for cosmetics, making up for when they were temporarily overtaken in 2020 by pharmacies, which had suffered less of the negative impact of the period of lockdown. It should be mentioned that the first indications that emerge from research institutes suggest that the market for alcohol-based products in perfume shops has abundantly surpassed pre-Covid levels of consumption (growing by 21% in the period from 2019 to 2023), driven by the established fragrances (accounting for over 90% of the value and up by 11.3%), compared to new launches (just under 10% of total value, with a slight contraction). Projections for the channel's future performance in 2024, certainly driven by fairly substantial price increases, suggest a growth rate of more than 11% to a total market value of more than €2,800 million.

Performing with a logic comparable to pharmacies, consumption purchased through **mass market** retail was more stable and continuous than other channels, up by 8.0%, to a total value of more than €5,200 million. Nevertheless, as already perceived in previous financial years, the great quantity of purchases that are moved through the mass market contains several different dynamic developments, resulting from buying choices that tend increasingly to shorten the times of reaction to external stimuli and expectations. The assortment and the price lever are among the leading drivers that accompany consumers' buying habits in this macro-channel, helping explain the successful performance of the specialist drugstore subsector (Home and Toiletries), whose values surpassed the historical primacy of the hyper and supermarkets,

becoming the leading major channel with a positive growth trend of 9.8% from 2022 to 2023. In addition to this formula of distribution, excellent performances were also recorded on the part of single-brand stores, which were driven up by a leap of 8.0%, after the drastic reduction suffered during the first phase of the crisis. The three phases of price trends that are found to have emerged between the period before the pandemic and the scenario that is taking shape today, i.e. those of deflation, fluctuation and inflation, contribute to an understanding of the strong growth recorded by the discount channel.

Accounting for 2.8% of cosmetics consumed in Italy in 2023, **direct sales**, both on a door-to-door basis and via mail order, ended the year with less positive trends than other channels, mostly because demand shifted towards other far more innovative forms of distribution. The channel nevertheless grew by 1%, to a sales volume of slightly more than €350 million by the end of the year. In recent financial years, both the difficulties encountered by some businesses and the long periods of pandemic lockdown, which blocked the possibility of door-to-door distribution, have generated a constant deceleration in sales volumes, although there are signs of new dynamics among businesses that specialise in this channel.

The 2023 financial year brought the definitive confirmation that use of the **e-commerce** channel has become securely rooted in Italian cosmetic consumer habits. Achieving a value in excess of €1,100 million, up by 12.5% over the previous year, online sales were in fact confirmed as the fourth channel of choice for cosmetics in Italy. The difficulties encountered in mapping the values of this phenomenon with accuracy are being compensated for increasingly as time moves on as a result of the collaboration between the Study Centre and Human Highway and partner institutions specialised in traditional distribution formulae, which are fine-tuning the details of online sales for their respective channels of competence. Forecasts for 2024 confirm double-figure rates of growth, applying the thinking of strategies to integrate online and offline brand efforts, each providing the other with reciprocal sales support.

Consumption through **beauty salons** increased by 5.3% in the 2023 financial year to a value of more than €206 million, accounting for 2.0% of total cosmetics consumption. This encouraging result follows on the contraction generated by the periods of closure in 2020. Against this background there has been no reduction in the efforts to achieve innovation advanced by businesses, which are always alert to remodulation in distribution and to the new areas of treatments and wellness. They achieve this by paying due attention to the new trends among consumers, who are increasingly demanding in terms of the quality of services, of those who provide them and of the settings where they are provided.

At the end of the 2023 financial year, the positive revival of consumption, both of services and of retail, was confirmed in **hairstyling salons**. A sustained growth rate 5.0% and a market value of €588 million saw consumption in this channel account for 5.2% of the total domestic cosmetics market, highlighting the dynamics practised by many professionals who have demonstrated the ability to behave proactively to the new situation of marketing, proposing segmentation strategies in both services and treatments to comply with the new conditions and the latest safety protocols introduced to limit the diffusion of Covid-19.





## **THE MARKET: PRODUCTS**

The analysis by product categories conducted by the Cosmetica Italia Study and Corporate Enterprise Centre contributes to a better understanding of the dynamics of consumption in Italian families, by cross-referencing data identified by various research institutes with historical databases and with the analyses derived from internal statistics that are subject to continuous updating for each sales channel. When compared to the period before the Covid pandemic, last year's trend describes the new orientations of consumption that have now taken root in the cosmetics market in Italy.

The analysis confirms the positive general trend registered in the last three years. Excellent performances are found in particular in eye and lip make-up products, resulting from the lasting positive rebound from the facemask effect, which had such a severe impact on the consumption of these kinds of cosmetic products during the pandemic crisis. Following on the sustained growth experienced last year, double-figure positive growth dynamics are confirmed, generated above all by the increase in prices (for perfumery), by constant growth (e-commerce) and by positive rebounds (herbalist shops).

In conclusion, trends are less virtuous in the categories with a higher impact in domestic consumption routines during the long periods of lockdown, such as body hygiene products which, after two years, are retreating from the vigorous growth chalked up in 2021, and hair care products, which are witnessing a return of the experience and quality of service in professional channels.

### **Face care**

Products dedicated to skincare account for more than 16% of Italians' cosmetics consumption, constituting the primary product family with consumption worth a total of €1,612 million in 2023, with a substantial increase in consumption, up by 9.5% over the previous year (4% more than the growth experienced in 2022). The trend continues, as in the last two years, of the excellent dynamics generated by product hybridisation involving the make-up sector, which can be read as part of the narrative of functionality claims more typical of skin care. 2023 brought an excellent across-the-board trend in pharmacies (up by 10.7%) and in pharmacies (up by 10.1%) and a good trend in mass market distribution (up by 7.3%).

If we now analyse the trends for individual products, we find good growth in cleansers and make-up removers for the face and eyes (+14.8% to a value of €191 million) and in moisturising and nutrient creams (+13.2%, for a value of €279 million at the end of 2023). The sub-categories with greater value per weight, such as anti-ageing and anti-wrinkle creams, as well as the moisturising and nutrient creams already mentioned, chalked up a positive growth rate of 6.9% to a value of €698 million.

This family of products was driven positively by pharmacies, which account for over 39% of all facial product consumption.

### **Body care**

In 2023, the segment devoted to body care was the second largest family of consumption in the Italian population's habits, accounting for 15.2% of total sales and achieving a market value of



€1,490 million, with a growth rate of 8.7% compared to 2022. This variation, with a slightly slower rate of growth than that experienced in the previous financial year, applies across the board within the various product subcategories, with sun and pigmenting products leading the field at a value of €440 million, a growth of 9.4% generated by the favourable evolution of the seasons.

The negative trend continues in consumption of products for cellulitis (down by 9.1% to €47 million), while the trend was practically flat for firming, specific zone and anti-body ageing products (up by 0.3% to €57 million). Continuing the trend that has held for the last three years, consumption of deodorants and antiperspirants expanded, growing by more than 13.0% to a value of €539 million. Mass market distribution, which accounts for nearly 58% of this category's consumption, ended the year on a positive dynamic of nearly 10%.

### **Fragrances**

The performances of fragrances for both women and men were excellent in 2023, with respective growth rates of 11.7%, to €8497 million, and 10.5%, to €512 million. The trend generated by consumption through perfumery shops was more than positive (+13.9%), while performances were scaled back in the more recent formulae of distribution, such as SSS-Drug or Home and Toilette, which had experienced better growth dynamic in recent years than the more traditional channels.

### **Body hygiene**

Products dedicated to body hygiene, which constitute the fourth largest family by value, ended the year with a more modest growth rate than the other leading categories: this trend in consumption applied across the board to many subcategories. The greatest contribution to the category's growth came from bath and shower gels, which were up by 7.7% to a value of €472 million, while the shift in consumption way from liquid soaps (up by 0.4%) and towards bar soaps and syndets that offer solutions with pH values similar to those of the skin was consolidated: extensive use of hand gels and sanitisers probably oriented consumer preferences towards alternative ways of cleansing and washing their hands.

### **Hair care**

In addition to the products sold at retail and those used in hairdressing salons, this category also includes products for haircare and scalp care sold through other consumption channels. As was already the case in 2022, this latter category recorded a positive trend (+7.3% to a value of €1,028 million), although it was below par when compared to the cosmetic market as a whole, considering consumers' return to using salons, which refocused attention on qualified service.

In terms of value, products for haircare occupy the fifth place in the market, accounting for 10.5% of sales through traditional channels, more than two thirds of which are sold through the mass market distribution channel, approximately 19% through pharmacies and lastly just a little more than 4% through perfume shops.

Selling for a total of €481 million, shampoos closed the 2023 financial year with an increase of 7.3%. Similar growth was also experienced by conditioners, balsams and masks (up by 6.9% to

€161.5 million). Although more marginal in terms of value, excellent growth trends were achieved by lacquers (+12.3%) and by fixatives and structuring mousses (+22.5%).

While still positive, more modest growth was achieved by dyes and dye sprays, the second family of products by value, which were up by 3.2% to a value of €171 million, and by lotions and shock treatments (+5.2%).

### **Make-up**

Make-up products achieved a vigorously positive trend in 2023, above all face and lip products, keeping up the pace of performance in the last three years, achieved primarily through distribution in perfume shops and in SSS-Drugstores.

Looking at the specifics of the categories, 2023 brought excellent growth figures for facial make-up, which increased by 20.0%, and make-up for the lips, up by 14.6%, while the performance of products for hand care was good, at +4.0%. The growth dynamic experienced by make-up boxes, on the other hand, was marginal, at 1.3%.

### **Trends compared**

This analysis of the positive and negative trends at work among product families and individual products enables us to highlight the more evident phenomena found in the data referring to 2023. The most significant of these trends, in growth terms, were achieved by concealers for cheeks, blushes and powders (+31.2%) , followed by gift packs, reflecting the positive rebounds that followed financial years in which this kind of cosmetic products and formats had suffered contractions. Negative figures were recorded by products for foot hygiene (down by 0.4%) and by nail cleaner solvents (down by 1.4%), marginal categories that demonstrate the fundamental homogeneity and across-the-board nature of growth in the various cosmetic categories that inevitably felt the effect of inflation, which impacted on Italians' average shopping bill to the tune of approximately 7%.

Data processed by Cosmetica Italia Statistics Dept. Values in million Euros and change from previous period.

	TOTAL		Pharmacies		Perfume shops		Mass market	
	2023	% variation 23-22	2023	% variation 23-22	2023	% variation 23-22	2023	% variation 23-22
<b>HAIR AND SCALP CARE</b>	<b>1.028,0</b>	<b>7,3</b>	<b>191,5</b>	<b>1,8</b>	<b>44,0</b>	<b>14,7</b>	<b>792,5</b>	<b>8,3</b>
Shampoos	481,3	7,3	103,8	2,8	11,8	19,2	365,7	8,4
Lotions and shock treatments	69,1	5,2	49,9	4,5	9,0	20,0	10,2	- 2,5
Dyes and coloured mousses	170,8	3,2	26,6	- 6,0	9,4	2,0	134,9	5,4
Lacquers	67,8	12,3	0,2	- 6,7	3,3	34,2	64,3	11,5
Post-shampoo treatments, balsams and masks	161,5	6,9	10,5	2,3	6,9	13,3	144,1	7,0
Fixers and structuring mousses	30,6	22,5	0,1	- 3,4	2,0	13,8	28,5	23,3
Gels, waters and gums	46,9	11,3	0,4	- 4,2	1,7	11,5	44,8	11,5
<b>PRODUCTS FOR FACE CARE</b>	<b>1.612,2</b>	<b>9,5</b>	<b>630,4</b>	<b>10,7</b>	<b>501,7</b>	<b>10,1</b>	<b>480,2</b>	<b>7,3</b>
Face and eye detergents and make-up removers	191,3	14,8	63,5	16,5	46,7	17,2	81,2	12,3
Facial tissues	50,4	4,6	3,7	15,3	7,6	22,4	39,1	0,8
Toning lotions	41,7	10,6	6,6	11,3	20,5	15,8	14,6	3,7
Periocular area and specific zones	169,1	9,5	61,0	11,6	76,1	7,7	32,0	10,1
Moisturising and nutrient creams	279,1	13,2	114,1	13,2	68,6	19,3	96,4	9,3
Anti-ageing and anti-wrinkle creams	698,3	6,9	280,9	8,8	248,6	5,7	168,8	5,7
Masks and exfoliant scrubs	83,9	10,7	17,1	23,7	23,3	8,4	43,5	7,4
Products for skin impurities	71,1	8,3	59,9	4,2	9,0	48,5	2,2	5,7
Depigmenting products	27,4	11,7	23,6	14,1	1,3	16,1	2,5	- 8,2
<b>PRODUCTS FOR FACIAL MAKE-UP</b>	<b>644,3</b>	<b>20,0</b>	<b>49,5</b>	<b>10,7</b>	<b>230,3</b>	<b>37,4</b>	<b>364,5</b>	<b>12,3</b>
Foundations and coloured creams	315,9	11,9	29,1	10,7	104,5	13,6	182,3	11,2
Face powder	77,1	22,2	3,8	23,4	26,7	52,4	46,6	9,7
Cheek correctors, blushes and clays	251,3	31,2	16,6	8,2	99,0	70,8	135,7	14,8
<b>MAKE-UP PACKS</b>	<b>55,7</b>	<b>1,3</b>	<b>0,2</b>	<b>15,5</b>	<b>39,1</b>	<b>-</b>	<b>16,3</b>	<b>4,3</b>
<b>PRODUCTS FOR EYE MAKE-UP</b>	<b>589,2</b>	<b>7,8</b>	<b>36,0</b>	<b>11,9</b>	<b>150,7</b>	<b>7,2</b>	<b>402,5</b>	<b>7,6</b>
Shadows	130,3	7,7	3,7	7,9	28,2	5,6	98,4	8,3
Mascaras	237,2	9,5	19,4	12,5	71,2	11,2	146,6	8,4
Liners and pencils	221,7	6,0	12,9	12,1	51,3	3,1	157,5	6,5
<b>PRODUCTS FOR LIP CARE</b>	<b>469,8</b>	<b>14,6</b>	<b>77,1</b>	<b>21,9</b>	<b>103,9</b>	<b>23,2</b>	<b>288,8</b>	<b>10,1</b>
Lipsticks and lip glosses	313,0	15,8	17,9	27,0	79,9	21,4	215,2	13,0
Liners and pencils	59,0	16,0	2,7	24,7	18,3	39,6	38,0	6,8
Protections, colourless foundations and sun sticks	97,7	10,2	56,5	20,2	5,7	5,6	35,6	- 2,1
<b>PRODUCTS FOR HAND CARE</b>	<b>219,2</b>	<b>4,0</b>	<b>42,8</b>	<b>2,8</b>	<b>16,9</b>	<b>- 4,6</b>	<b>159,5</b>	<b>5,3</b>
Creams, gels, lotions and nail products	66,5	3,6	36,2	2,5	2,4	- 3,0	27,9	5,6
Nail varnishes	137,2	4,8	5,5	4,4	10,8	- 6,1	120,9	5,9
Solvents and other products	15,6	- 1,4	1,2	3,1	3,7	- 0,7	10,7	- 2,1
<b>PRODUCTS FOR BODY CARE</b>	<b>1.490,5</b>	<b>8,7</b>	<b>500,8</b>	<b>6,3</b>	<b>128,0</b>	<b>10,9</b>	<b>861,6</b>	<b>9,9</b>
Moisturisers, nutrients and exfoliant scrubs	227,3	6,9	87,5	5,0	24,9	8,2	114,9	8,0
Multipurpose creams	88,4	6,7	56,3	6,0	5,9	9,3	26,1	7,5
Body waters and oils	32,6	4,4	22,1	7,6	7,8	- 0,9	2,7	- 3,7
Anti-cellulite products	47,0	- 9,1	29,7	- 10,5	4,7	- 17,4	12,6	- 1,9
Firming agents and anti-ageing products	56,8	0,3	24,3	- 4,3	8,8	17,0	23,6	- 0,1
Deodorants and antiperspirants	538,5	13,5	69,2	7,3	13,2	6,7	456,1	14,8
Hair removers	59,9	0,8	1,9	- 4,1	4,8	2,5	53,2	0,9
Sunscreens and pigmented products	439,9	9,4	209,8	10,9	57,8	18,4	172,3	5,1
<b>PRODUCTS FOR BODY HYGIENE</b>	<b>1.081,6</b>	<b>5,7</b>	<b>300,8</b>	<b>4,0</b>	<b>23,3</b>	<b>- 9,4</b>	<b>757,5</b>	<b>7,0</b>
Soaps and syndets	102,7	9,3	47,0	5,9	2,3	- 22,2	53,5	14,5
Liquid soaps	143,4	0,4	17,0	3,3	5,3	- 16,4	121,1	0,9
Bath and shower foams, salts, powders and oils	471,8	7,7	60,5	3,0	10,6	- 4,1	400,8	8,9
Talcs and powders	30,4	4,9	2,9	3,2	2,6	- 0,3	24,9	5,6
Products for foot hygiene	32,3	- 0,4	17,3	2,1	0,8	- 3,6	14,3	- 3,0
Products for intimate hygiene	303,1	5,3	156,2	4,1	1,8	- 12,1	145,1	6,8
<b>PRODUCTS FOR ORAL HYGIENE</b>	<b>732,5</b>	<b>9,8</b>	<b>158,1</b>	<b>8,1</b>	<b>4,1</b>	<b>- 2,2</b>	<b>570,3</b>	<b>10,4</b>
Toothpastes	528,1	10,9	65,4	6,6	3,5	- 2,0	459,2	11,6
Mouthwashes, breath fresheners	204,4	7,1	92,7	9,1	0,7	- 3,1	111,1	5,6
<b>SKIN CLEANSING PRODUCTS FOR INFANTS</b>	<b>242,1</b>	<b>1,7</b>	<b>74,6</b>	<b>1,4</b>	<b>4,6</b>	<b>0,2</b>	<b>162,8</b>	<b>1,9</b>
<b>PRODUCTS FOR MEN</b>	<b>141,6</b>	<b>4,7</b>	<b>8,9</b>	<b>3,2</b>	<b>40,7</b>	<b>7,0</b>	<b>92,0</b>	<b>3,8</b>
Soaps, shaving foams and gels	58,4	4,1	2,8	1,6	4,7	2,5	51,0	4,4
After shave products	46,8	2,1	2,9	4,8	12,1	1,2	31,8	2,1
Treatment creams	36,3	9,2	3,2	3,3	24,0	11,1	9,2	6,6
<b>ALCOHOL-BASED PERFUME PRODUCTS</b>	<b>1.375,3</b>	<b>12,4</b>	<b>25,8</b>	<b>17,6</b>	<b>1.094,9</b>	<b>13,9</b>	<b>254,5</b>	<b>5,9</b>
Toilet waters and perfumes for women	856,9	12,7	22,6	17,7	700,8	13,9	133,5	6,3
Toilet waters and perfumes for men	518,3	11,9	3,2	16,9	394,1	14,0	121,0	5,4
<b>GIFT PACKS</b>	<b>165,6</b>	<b>18,6</b>	<b>1,2</b>	<b>4,8</b>	<b>149,9</b>	<b>20,6</b>	<b>14,5</b>	<b>1,9</b>
Gift packs for women	89,1	19,1	0,7	5,4	82,3	20,7	6,1	2,1
Gift packs for men	76,4	18,0	0,4	3,8	67,7	20,5	8,4	1,8
<b>TOTAL TRADITIONAL CHANNELS</b>	<b>9.847,6</b>	<b>9,6</b>	<b>2.097,7</b>	<b>7,5</b>	<b>2.532,3</b>	<b>14,2</b>	<b>5.217,5</b>	<b>8,3</b>
E-COMMERCE	1.111,5	12,5						
HERBALIST STORES	423,4	12,0						
DIRECT SALES	352,2	1,1						
HAIRDRESSING SALONS	588,6	5,0						
BEAUTY SALONS	206,6	5,3						
<b>TOTAL ITALIAN COSMETICS MARKET</b>	<b>12.529,9</b>	<b>9,4</b>						



## **METHODOLOGY**

When investigating the value of production, i.e. of the **total turnover** achieved by cosmetics industry, the Statistics Department bases its calculations on the panels drawn up by the Italian national institute of statistics – ISTAT, but above all on the collection and elaboration of the financial reports issued by companies.

The constant refinement of these bases has led to a substantial increase in the values of turnovers, which is re-elaborated with respect to previous years, to ensure that the final statistics are comparable on a year-by-year basis.

With regard to the values of **markets, distribution and products**, the Statistics Department analyses and elaborates data based on the categories of Cosmetica Italia, completing them with detections from Nielsen IQ, Circana, New Line, MeTMI, Human Highway and other data monitors and combining the databases with the benchmarks defined with the firms belonging to the respective groups. The Statistics Department then elaborates the final data, allowing for comparison of historical basis and proceeds to check the adequacy of trends in the light of changes in distribution channels. These checks, of a qualitative orientation nature, are carried out through interviews and discussions with the industry's more highly specialised operators.

To guarantee the reliability of the data collected and elaborated, a tool has been developed for measuring the variations expressed in the preliminary results provided in "Cosmetics by Numbers" and their comparison with the percentage variations calculated in the final reports.

The resulting index, as an output from the Statistics Department, is an element that is taken into consideration in the checks run by the Certiquality experts, who double-check for compliance with quality procedures. In this regard, attention is called to the fact that Cosmetica Italia and Cosmetica Italia Servizi have received the confirmation of **UNI EN ISO 9001:2015** and **14001: 2015 certification**.

