COSMETICS INDUSTRY: MANUFACTURE, MARKET AND FOREIGN TRADE

The preliminary figures relative to the Italian cosmetics industry for the 2021 financial year are being published, as usual, on the occasion of athe Cosmoprof in Bologna, which has now reached its 53rd edition. In line with the advance information already contained in the recent conjunctural report, statistics pertaining to the Italian market and to the turnover achieved by Italian firms now confirm a trend to recuperate to pre-Covid levels, despite the existence of a particularly critical background situation: in general, 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. This trend is now unfortunately found to be slowing down in the opening months of 2022, as a result of the increase in energy costs and of the drama of the war currently being fought in Ukraine. The industry completed the 2021 financial year with a turnover in excess of €11,800 million, achieving a growth rate of 9.9%, while exports confirmed its important dynamic potential, topping €4,800 million in value and increasing by 13.8% over the previous year. The industry's impact on the country's balance of trade in 2021 was significant, returning to the pre-crisis level of €2,750 million by diversifying the industry's target markets and confirming turnovers in countries that have been constant partner for more than 25 years. 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 during 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 the year with a value of more than €10,600 million, up by 8.8% 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 have been practised by many firms in recent years, pushing the boundaries of our analyses. Consumers still favour the cheaper price bands and channels, gradually squeezing the intermediate price bands. So far, the impact of the increase in energy prices on distribution channels has only been marginal, although the lever of inflation points to expectations of price increases for consumers in the region of 4.2% to 5.8%.

ITALIAN COSMETICS MARKET

+8.8%

change from 2021 to 2020

PRODUCTION OF COSMETICS IN 2021

11,810

million euros

EXPORT OF COSMETICS

+13.8%

change from 2021 to 2020

CHANNEL TRENDS AND PERFORMANCE IN 2021

+23.2%

E-Commerce

+22.4%

Professional channels

In 2021, the overall turnover of the Italian cosmetics industry, in other words the value of its total production, ended the year at something more than **€11,800** million, an increase of **9.9%** 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 revival brought about when hairdressing and beauty salons reopened after the lockdown.

While on the one hand the preliminary figures for the end of the 2021 financial year are slightly higher than previous estimates, on the other several important revisions have been made to the projections for 2022 that were anticipated during earlier appointments with the Study Centre.

The difficulty encountered in making these estimates was due to decelerations in the value chain that emerged with the outbreak of the pandemic, leading to spiralling increases upstream of the production chain, focusing businesses' concerns on production costs and, as a consequence, on margins. The scenario has been complicated by the advent of the war between Russia and Ukraine, which is worsening the situation of uncertainty in the geopolitical scenario, with repercussions on those of health and the economy.

While the cosmetics industry proved its ability to withstand the negative cycle of the scenario in the last couple of years, new grey areas are now appearing on the scene with uncertainty that, so far, does not seem to be harming the perspectives of recuperation and growth, nor entrepreneurs' partial return to exploring new foreign markets and targets of consumption. Nevertheless, these perspectives are clouded both by international tensions and by the long after-effects of Covid-19, which is still putting a moderate brake on commercial exchanges.

In the light of these considerations, in fact, **forecasts for 2022** for the cosmetics industry's turnover indicate estimates of **2.7% growth**, once again confirming that values are returning to pre-crisis levels, growing again by a further **3.3% in 2023**. These are of course indications that were elaborated in mid-April, which means that they may be subject to further adjustments in the course of the year as a result of the evolution of the socioeconomic context.

Turning to look at foreign markets, we find a sustained revival of international trade on the part of Italian cosmetics firms, with a growth of 13.8% at the end of the 2021 financial year, to a value of nearly €4,850 million. One consequence of this excellent export performance is that Italy's balance of trade has returned to its pre-Covid values, reaching approximately €2,750 million. Short-term export growth estimates also reflect the uncertainty of the scenario, leading to projections of 3.0% growth by the end of the 2022 financial year and of 4.5% in 2023.

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 this publication, whose purpose is to measure 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 nearly 10%. Meanwhile, the increase in energy costs, now more than 35%, is a primary impact felt across the board.

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.

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.

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 emerge as additional strong points, together with 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 and those cosmetic firms that had not yet adapted to online sales accelerated the process of digitalisation.

IMPORTS AND EXPORTS

Italy's cosmetics exports increased in 2021 by 13.8% over the previous year, achieving a total value, in preliminary end-of-year records, of more than €4.8 billion and confirming the industry's return to the double-figure export growth rates that had fallen off in the course of 2020.

The news is also positive with respect to the level of concentration in the top ten markets in value terms for Italian cosmetics exports which, accounting for slightly less than 64% of the total, redistributes the value going to markets other than consolidated commercial partners by just over 2%.

An interpretation of the two-year period 2019-2021 indicates a partial recuperation of the value of exports that, as in the case of the domestic turnover, is expected to return to pre-crisis levels in the course of 2022.

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, France (up by 6.0%), the Unites States (up by 28.0%) and Germany (up by 6,6%) absorb Italian cosmetics exports worth more than €1.5 billion. Yet the United States were not the only destination that marked up an increase in exports in double figures: Hong Kong increased by 23.1%, the Netherlands by 34.0% and the United Arab Emirates by 37.2%.

A slight contraction was experienced by the United Kingdom, down by 1.0% as a consequence of the effects generated by Brexit.

To go into more detail about product families, the categories most closely concerned with sanitising functions turned in negative results, as personal and oral hygiene suffered contractions of 5.1% and 1.4% respectively. Although marginal in terms of value, depilatory products, which are classified under the residual heading of "other products", suffered a 9.8% drop in exports.

Positive results, deriving from the same reasons that underlie domestic consumption, were recorded by alcohol-based perfume products, which were up by 22.9%, haircare products, which increased by 14.7% as a result of the strong export orientation of firms specialising in the hairdressing sector, and make-up products (up by 13.3%).

Imports also performed extremely well, driven above all by products for body care (up by 10.3%) and alcohol-based perfume products (up by 19.4%).

This latter family of products, together with make-up and haircare products, recorded higher balances of trade than other cosmetic categories, demonstrating the high degree of specialisation and competitive edge of cosmetic firms in world markets.

THE MARKET: DISTRIBUTION CHANNELS

By the end of the 2021 financial year, the cosmetics market in Italy had renewed its model of distribution in response to the conditions that had emerged during the crisis. The decelerations and accelerations experienced in sales of cosmetic products derive from new buying and consumption habits that generated a value of €10,640 million and a growth of 8.8% compared to the 2020 financial year. Nevertheless, the technical recession that is due to afflict Italy in the course of 2022 suggest that cautious estimates are in order for 2023, which will be affected by a slow-down in propensity to buy, the impact of inflation and the deceleration in international trade brought about by the crisis between Russia and Ukraine.

If we now investigate these estimates, we find a projection that the cosmetics market will close the year 2022 with a growth of 3.3%, with a probably stable growth trend continuing also in 2023, projected at +3.2%, such that the value of cosmetic products consumed should exceed €11,300 million in the next two years.

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

More specifically, sales of cosmetics through the **pharmacy** channel recuperated slightly compared to the period before Covid (they had contracted by 3.5% from 2019 to 2020, but picked up by 3.1% in 2020-2021), leading to a value of consumption through this channel of slightly less than €1,870 million.

The cosmetics sold through this channel scale back the weight of their value on the total market of 17.5%, taking it back towards the share it accounted for in 2019 (it had risen to 18.5% at the end of 2020). During the health crisis, pharmacies were one of the channels that enjoyed privileged access for essential goods, so that strategies of cross-selling favoured cosmetics, hand sanitisers and dermocosmetic products, augmenting the sales of pharmaceuticals and swab test services. Projections for the end of 2022 indicate that the channel will achieve a value of more than €1,900 million (+2.0%), and this is expected to increase by a further 2.5% in estimates for 2023.

Sales through the **herbalist shop** channel showed a positive trend for the 2021 financial year compared to 2020, achieving a total value of slightly more than €375 million. Nevertheless, recuperation of pre-Covid values has been put off and is not projected to be achieved before 2023. While the two years 2019-2021 chalked up a contraction of nearly 16%, the figures for the end of 2021 (+13.8%) and the trends forecast for 2022 and 2023 of 2.5% annual increases are not yet sufficient to make up for the losses sustained during the crisis.

In terms of the channel's coverage, sales through herbalist shops accounted for 3.5% 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 in 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 2021 financial year, the **perfume shop** channel chalked up one of the most dynamic increases among the traditional channels, growing by 21.3%, the result of a positive surge following the contraction experienced in the course of 2020. Although there is no return to pre-Covid levels of consumption, with a volume of almost €1,880 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 our partner institutions suggest that the market for alcohol-based products in perfume shops has already returned to pre-Covid levels of consumption (growing by 3% in the two-year period of 2019-2021), driven by the sustained performance of the established fragrances (accounting for over 90% of the value and up by 6%), compared to the more modest yield of new launches (just under 10% of total value, with a contraction of 26%). Projections for the channel's future performance in 2022 and 2023 are stable, however, at +2%.

Performing with a logic comparable to perfume shops, consumption purchased through **mass market retail** was more contained than other channels, up by 2.7%, to a total value of more than €4,540 million. Nevertheless, the great quantity of purchases that are moved through the mass market contains several different dynamic developments, resulting from buying choices that tend 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 5.7% from 2020 to 2021. 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 15.7%, after the drastic reduction suffered during the first phase of the pandemic 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. In fact, the logic of consumers' propensity towards saving that accompanies scenarios of uncertainty leads them to prefer buying choices through this kind of channel, which grew by 9.4% in the two year period of 2019-2021.

Accounting for 3.2% of cosmetics consumed in Italy in 2021, **direct sales**, both on a door-to-door basis and via mail order, ended the year with more negative trends than other channels, mostly because demand shifted towards other far more innovative forms of distribution. The channel nevertheless grew by 2%, to a sales volume of slightly more than €340 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 deceleration in sales volumes.

The 2021 financial year brought further corroboration that use of the **e-commerce** channel has become securely rooted in Italian cosmetic consumer habits. Achieving a value in excess of €870 million, up by 23.2% over the previous year, online sales were 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 2023 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 25.2% in the 2021 financial year to a value of more than €210 million, accounting for 2.0% of total cosmetics consumption. This positive result came about as a consequence of the positive revival after the periods of lockdown 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 2021 financial year, the positive revival of consumption, both of services and of retail, was confirmed in hairdressing salons. A sustained growth rate 21.3% and a market value of €550 million saw consumption in this channel account for 5.2% of the total domestic cosmetics market, highlighting the dynamics practised by many professionals who demonstrated the ability to behave proactively to the new situation of marketing, proposing segmentation strategies in both services and treatments to comply with the restrictions and the later safety protocols introduced to limit the diffusion of Covid-19.

METHODOLOGY

When investigating the value of production, i.e. of the overall turnover achieved by cosmetics firms, the Study Centre 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 the companies in question. 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, so as ensure that the final statistics are comparable on a year-by-year basis.

With regard to the values of markets, distribution and products, the Study Centre analyses and elaborates data based on the categories of Cosmetica Italia, complementing them with readings from NPD, IQVIA, Nielsen and other data monitors and combining the databases with the benchmarks defined with the firms belonging to the respective groups. The Study Centre than elaborates the final data, so as to allow for comparison between past data sets, and checks the congruousness of trends in the light of changes in distribution channels.

Indicative and qualitative in nature, these checks take the form of interviews and discussions with the industry’s more highly specialised operators.

In the interests of guaranteeing that the data collected and elaborated are reliable, 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 Study Centre, 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.

Consumption of cosmetic products in 2021
(million euros and % var. '21/'20)

	Pharmacies		Perfume shops		Other channels		*of which SSS-Drug*		TOTAL	
1. HAIR AND SCALP CARE	**186.1**	**-3.5**	**31.2**	**9.0**	**743.8**	**-3.2**	***315.8***	***0.9***	**961.1**	**-2.9**
Shampoos	95.7	1.5	6.7	25.9	337.7	0.1	*117.4*	*7.2*	440.1	0.8
Lotions and shock treatments	49.5	3.0	4.5	27.1	10.7	11.8	*5.5*	*13.3*	64.7	5.8
Dyes and coloured mousses	29.9	-22.6	10.2	-12.8	139.9	-16.4	*92.8*	*-11.4*	180.1	-17.3
Lacquers	0.2	-9.7	2.3	19.2	56.6	-0.2	*17.4*	*5.4*	59.1	0.4
Post-shampoo treatments, balsams and masks	10.3	-6.4	4.2	39.2	136.1	0.5	*60.3*	*7.6*	150.6	0.8
Fixers and structuring mousses	0.1	-14.2	1.8	23.4	23.1	0.6	*9.6*	*4.9*	24.9	1.9
Gels, waters and gums	0.4	-20.9	1.5	-9.4	39.6	2.1	*12.7*	*6.2*	41.5	1.4
2. PRODUCTS FOR FACE CARE	**557.2**	**4.6**	**403.5**	**20.1**	**548.9**	**7.2**	***155.3***	***8.8***	**1,509.6**	**9.3**
Face and eye detergents and make-up removers	51.0	5.6	34.1	19.7	84.9	9.3	*20.7*	*11.0*	170.0	10.1
Facial tissues	2.6	-6.8	5.2	25.3	49.6	0.0	*10.7*	*1.4*	57.5	1.5
Toning lotions	5.8	-4.3	16.1	22.8	17.3	3.5	*4.0*	*2.3*	39.2	9.2
Periocular area and specific zones	54.4	6.1	63.7	21.8	33.2	20.4	*10.0*	*35.0*	151.3	15.4
Moisturising and nutrient creams	102.8	-1.8	51.6	27.7	103.8	5.4	*24.1*	*5.1*	258.2	6.0
Anti-ageing and anti-wrinkle creams	253.3	5.0	204.7	17.5	203.1	6.2	*58.0*	*7.0*	661.1	9.0
Masks and exfoliant scrubs	14.8	3.7	21.3	17.2	50.4	11.1	*24.3*	*9.1*	86.5	11.2
Products for skin impurities	54.0	14.2	5.9	13.5	2.4	15.4	*0.8*	*16.7*	62.4	14.2
Depigmenting products	18.4	9.4	1.0	8.2	4.2	25.1	*2.7*	*29.1*	23.6	11.9
3. PRODUCTS FOR FACIAL MAKE-UP	**40.9**	**2.9**	**127.7**	**14.7**	**288.1**	**13.7**	***56.4***	***11.7***	**456.7**	**12.9**
Foundations and coloured creams	23.8	2.9	73.8	13.1	146.9	13.4	*27.0*	*10.7*	244.5	12.2
Face powder	2.9	0.3	9.3	13.5	37.8	10.9	*6.8*	*4.4*	50.0	10.7
Cheek correctors, blushes and clays	14.1	3.4	44.5	17.8	103.5	15.3	*22.6*	*15.4*	162.1	14.8
4. MAKE-UP PACKS	**0.3**	**-30.1**	**31.4**	**24.5**	**15.5**	**1.2**	***6.3***	***4.5***	**47.2**	**15.3**
5. PRODUCTS FOR EYE MAKE-UP	**30.2**	**4.3**	**120.7**	**27.3**	**338.9**	**14.9**	***77.6***	***15.7***	**489.8**	**17.0**
Shadows	3.1	5.2	23.3	32.7	81.8	16.8	*11.4*	*25.2*	108.2	19.5
Mascaras	16.4	4.3	54.6	27.7	122.2	12.5	*32.2*	*9.9*	193.3	15.6
Liners and pencils	10.6	3.9	42.8	24.1	134.9	16.1	*34.0*	*18.6*	188.4	17.0
6. PRODUCTS FOR LIP CARE	**48.6**	**2.2**	**60.1**	**23.2**	**235.6**	**9.0**	***68.4***	***8.6***	**344.3**	**10.2**
Lipsticks and lip glosses	9.8	-1.6	48.8	23.7	163.7	9.6	*21.4*	*-2.2*	222.3	11.8
Liners and pencils	1.3	2.4	8.0	19.5	32.9	16.0	*34.0*	*18.6*	42.2	16.1
Protections, colourless foundations and sun sticks	37.6	3.3	3.2	25.1	39.1	1.4	*13.1*	*4.3*	79.9	3.1
7. PRODUCTS FOR HAND CARE	**43.9**	**5.5**	**17.4**	**13.6**	**153.4**	**9.9**	***35.2***	***4.5***	**214.8**	**9.3**
Creams, gels, lotions and nail products	37.7	5.8	2.5	7.9	27.2	10.6	*7.8*	*3.6*	67.4	7.8
Nail varnishes	5.0	3.7	11.5	14.7	112.4	11.4	*23.3*	*5.2*	128.9	11.4
Solvents and other products	1.2	3.2	3.5	14.1	13.9	-2.0	*4.1*	*2.4*	18.5	1.0

	Pharmacies		Perfume shops		Other channels		*of which SSS-Drug*		TOTAL	
8. PRODUCTS FOR BODY CARE	**439.0**	**5.7**	**106.9**	**12.8**	**815.1**	**4.1**	***271.3***	***4.5***	**1,361.1**	**5.2**
Moisturisers, nutrients and exfoliant scrubs	87.3	3.6	22.5	26.3	120.0	4.3	*6.2*	*11.2*	229.8	5.8
Multipurpose creams	50.1	2.3	5.3	15.0	28.0	0.6	*55.9*	*5.5*	83.5	2.4
Body waters and oils	20.9	2.7	7.9	27.6	3.2	-6.5	*1.6*	*6.3*	32.0	6.8
Anti-cellulite products	34.6	-5.4	6.2	3.5	14.8	2.6	*6.0*	*-3.6*	55.6	-2.5
Firming agents, specific zone and anti-ageing products	27.9	-0.7	8.1	2.6	26.9	12.1	*7.8*	*-3.3*	62.9	4.9
Deodorants and antiperspirants	60.0	8.5	11.0	8.0	402.1	2.6	*122.2*	*6.0*	473.1	3.5
Hair removers	1.9	-10.4	4.8	-3.0	60.3	-12.3	*30.9*	*-11.9*	67.1	-11.6
Sunscreens and pigmenting products	156.2	11.9	41.1	10.6	159.7	16.1	*40.6*	*16.8*	357.1	13.6
9. PRODUCTS FOR BODY HYGIENE	**280.4**	**2.0**	**25.5**	**-0.9**	**710.9**	**-2.8**	***260.4***	***2.1***	**1,016.8**	**-1.5**
Soaps and syndets	43.9	3.4	3.1	-3.8	48.8	-11.0	*16.1*	*-5.4*	95.7	-4.7
Liquid soaps	16.5	2.3	6.6	-3.3	132.9	-10.7	*52.5*	*-6.2*	156.0	-9.2
Bath and shower foams, salts, powders and oils	55.5	2.6	10.3	1.2	354.8	0.3	*124.0*	*6.1*	420.6	0.6
Talcs and powders	2.5	2.9	2.7	0.5	23.7	1.5	*12.9*	*2.1*	28.9	1.5
Products for foot hygiene	17.2	3.1	0.8	0.7	15.4	4.1	*6.9*	*8.1*	33.4	3.5
Products for intimate hygiene	144.8	1.2	2.0	-0.9	135.3	-0.3	*48.1*	*4.4*	282.1	0.5
10. PRODUCTS FOR ORAL HYGIENE	**138.4**	**2.2**	**4.6**	**8.9**	**503.4**	**-0.4**	***151.7***	***4.6***	**646.4**	**0.2**
Toothpastes	61.1	2.6	3.9	1.2	395.3	-0.5	*117.9*	*4.6*	460.3	0.0
Mouthwashes, breath fresheners	77.3	1.8	0.7	1.0	108.1	-0.1	*33.9*	*4.4*	186.1	0.7
11. SKIN CLEANSING PRODUCTS FOR INFANTS	**72.5**	**-4.2**	**4.4**	**4.4**	**189.6**	**-0.5**	***45.1***	***4.5***	**266.5**	**-1.5**
12. PRODUCTS FOR MEN	**8.3**	**0.7**	**36.0**	**13.7**	**94.5**	**0.9**	***30.9***	***1.8***	**138.7**	**3.9**
Soaps, shaving foams and gels	2.7	-2.4	4.4	8.4	50.5	0.9	*12.6*	*-1.6*	57.6	1.3
After shave products	2.7	1.9	11.2	11.6	34.0	0.4	*13.8*	*3.4*	48.0	2.9
Treatment creams	2.8	2.8	20.3	16.1	10.0	2.1	*4.6*	*7.0*	33.1	10.3
13. ALCOHOL-BASED PERFUME PRODUCTS	**19.4**	**17.5**	**797.9**	**25.6**	**267.3**	**12.8**	***197.5***	***14.1***	**1084.5**	**22.0**
Toilet waters and perfumes for women	17.0	10.8	509.8	25.7	140.4	12.3	*106.7*	*12.5*	667.2	22.2
Toilet waters and perfumes for men	2.4	7.7	288.1	25.4	126.8	13.3	*90.9*	*15.9*	417.3	21.4
14. GIFT PACKS	**1.1**	**278.8**	**109.8**	**19.3**	**15.3**	**3.5**	**6.6**	**3.6**	**126.2**	**17.8**
Gift packs for women	0.7	1.0	60.0	19.8	6.5	2.7	*3.0*	*3.5*	67.2	17.8
Gift packs for men	0.4	0.7	49.7	18.7	8.9	2.4	*3.6*	*3.7*	59.0	16.0
Total traditional channels	**1,866.2**	**3.1**	**1,877.2**	**21.3**	**4,920.4**	**3.5**	***1,678.6***	***5.7***	**8,663.8**	**6.8**
Direct sales									**344.3**	**2.0**
E-Commerce									**871.2**	**23.2**
Sales to beauty salons and centres									**210.8**	**25.2**
Professional hairdressing									**550.0**	**21.3**
TOTAL CONSUMPTION									**10,640.0**	**8.8**

Imports

	Quantities (tons)			Value (million euros)		
	2020	2021	change %	2020	2021	change %
Shampoos	50,047	51,867	3.6%	105	106	1.3%
Hair preparations	262	234	-10.7%	2	2	-0.6%
Lacquers	2,077	2,140	3.0%	8	9	13.0%
Hair lotions and other products for hair care	37,254	34,990	-6.1%	146	144	-0.8%
Powders and compact powders	2,334	1,044	-55.3%	50	45	-10.7%
Creams and other products	4,971	2,241	-54.9%	90	95	5.2%
Lip make-up products	3,303	4,250	28.7%	42	42	-0.8%
Products for eye make-up	2,353	2,288	-2.8%	28	31	11.9%
Nailcare products	59,506	65,743	10.5%	697	768	10.3%
Toilet soaps	10,621	11,243	5.9%	60	68	12.7%
Bath preparations	14,789	10,873	-26.5%	24	23	-6.6%
Body deodorants	28,259	29,707	5.1%	50	52	4.2%
Toothpastes	29,204	27,399	-6.2%	91	91	0.0%
Other preparations for oral hygiene	10,487	11,284	7.6%	33	36	10.2%
Shaving, pre-shave and after shave products	16,130	11,629	-27.9%	18	17	-8.1%
Perfumes and eau de parfums	12,350	15,454	25.1%	222	269	21.1%
Toilet waters and eau de colognes	9,787	14,228	45.4%	208	245	17.6%
Other perfume and toiletry products	9,514	8,838	-7.1%	59	60	1.1%
TOTAL	**303,248**	**305,454**	**0.7%**	**1,931**	**2,101**	**8.8%**

Imports - macro-categories

	Quantities (tons)			Value (million euros)		
	2020	2021	change %	2020	2021	change %
Products for hair care	89,641	89,232	-0.5%	260	261	0.5%
Products for make-up	12,961	9,823	-24.2%	210	212	1.1%
Products for body care	59,506	65,743	10.5%	697	768	10.3%
Personal cleansing	53,669	51,823	-3.4%	134	143	6.0%
Oral hygiene	39,691	38,682	-2.5%	124	127	2.7%
Products for men	16,130	11,629	-27.9%	18	17	-8.1%
Alcohol-based perfume products	22,137	29,683	34.1%	430	514	19.4%
Other products	9,514	8,838	-7.1%	59	60	1.1%
TOTAL	**303,248**	**305,454**	**0.7%**	**1,931**	**2,101**	**8.8%**

Exports

	Quantities (tons)			Value (million euros)		
	2020	2021	change %	2020	2021	change %
Shampoos	104,620	105,453	0.8%	250	268	6.9%
Hair preparations	1,675	1,439	-14.1%	10	9	-12.7%
Lacquers	3,528	4,406	24.9%	14	17	22.5%
Hair lotions and other products for hair care	123,086	483,359	292.7%	663	782	17.9%
Powders and compact powders	3,801	3,468	-8.8%	176	194	10.4%
Creams and other products	9,527	10,798	13.3%	327	386	18.1%
Lip make-up products	1,320	2,124	60.9%	22	28	26.9%
Products for eye make-up	5,639	5,493	-2.6%	164	172	5.0%
Nailcare products	56,335	102,546	82.0%	945	1,116	18.2%
Toilet soaps	26,361	24,758	-6.1%	137	142	4.1%
Bath preparations	40,885	21,639	-47.1%	50	34	-32.3%
Body deodorants	72,195	68,643	-4.9%	137	131	-4.5%
Toothpastes	6,375	6,033	-5.4%	49	50	1.2%
Other preparations for oral hygiene	102,971	100,406	-2.5%	188	184	-2.1%
Shaving, pre-shave and after shave products	6,495	10,363	59.5%	33	38	13.4%
Perfumes and eau de parfums	13,611	17,601	29.3%	380	480	26.4%
Toilet waters and eau de colognes	19,220	22,619	17.7%	572	689	20.5%
Other perfume and toiletry products	26,695	23,096	-13.5%	144	130	-9.8%
TOTAL	**624,338**	**1,014,246**	**62.5%**	**4,260**	**4,849**	**13.8%**

Exports - macro-categories

	Quantities (tons)			Value (million euros)		
	2020	2021	change %	2020	2021	change %
Products for hair care	232,909	594,657	155.3%	937	1,075	14.7%
Products for make-up	20,287	21,884	7.9%	688	780	13.3%
Products for body care	56,335	102,546	82.0%	945	1,116	18.2%
Personal cleansing	139,441	115,040	-17.5%	323	307	-5.1%
Oral hygiene	109,346	106,439	-2.7%	237	234	-1.4%
Products for men	6,495	10,363	59.5%	33	38	13.4%
Alcohol-based perfume products	32,831	40,220	22.5%	952	1,169	22.9%
Other products	26,695	23,096	-13.5%	144	130	-9.8%
TOTAL	**624,338**	**1,014,246**	**62.5%**	**4,260**	**4,849**	**13.8%**

Source: compiled by the Cosmetica Italia Statistics Dept. on the basis of ISTAT data.