Beauty Circana

Uno sguardo ai consumatori e ai canali

Circana.

COSMETICA ITALIA
associazione nazionale imprese cosmetiche

Global Beauty Results

Beauty global view by region

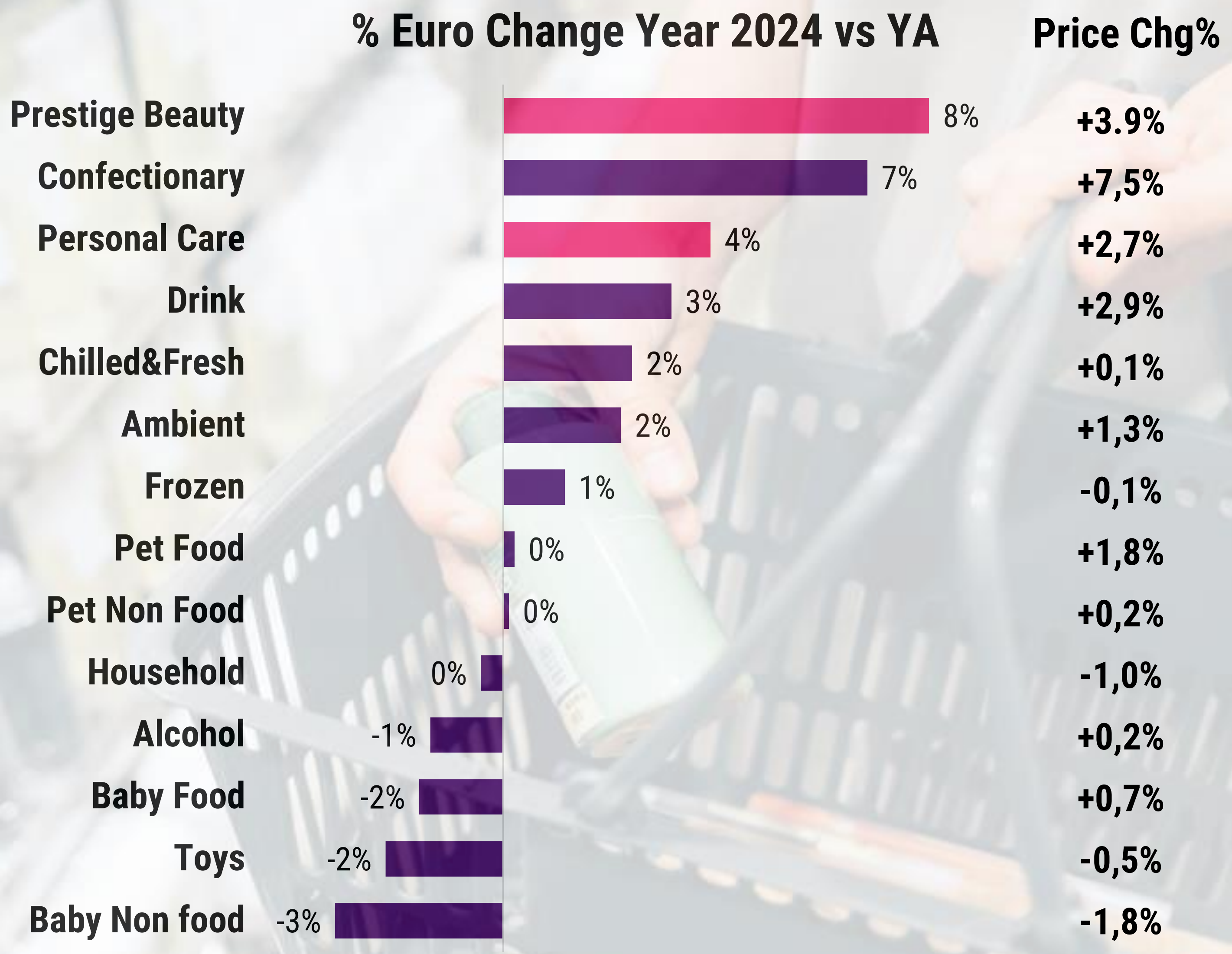
By Region – Annual 2024

Source: Circana / Beauty Trends / TMM / North America: U.S., Canada / Europe: France, U.K., Germany, Italy, Spain / Annual 2024
Omni-channel Mass beauty market: US only / Annual 2024
LATAM: Mexico, Brazil, Argentina, Chile, Peru / Mass vs. Prestige brands / South America performance with Hair in Chile only / January-November 2024
China: Ecommerce only: Include B2C (Tmall & JD.com), TR (online travel retail: CDF Hainan) and DY (livestreaming, including Douyin) / January-November 2024
Australia: National Grocery (Supermarkets) Hair, Cosmetics, Skincare, Deodorants/Talc, MAT June 10, 2024
Europe Mass: France, Italy, Spain, Germany/ Annual 2024

Circana.

Beauty continued to post the fastest gains across retail in Europe

EUROPE 5

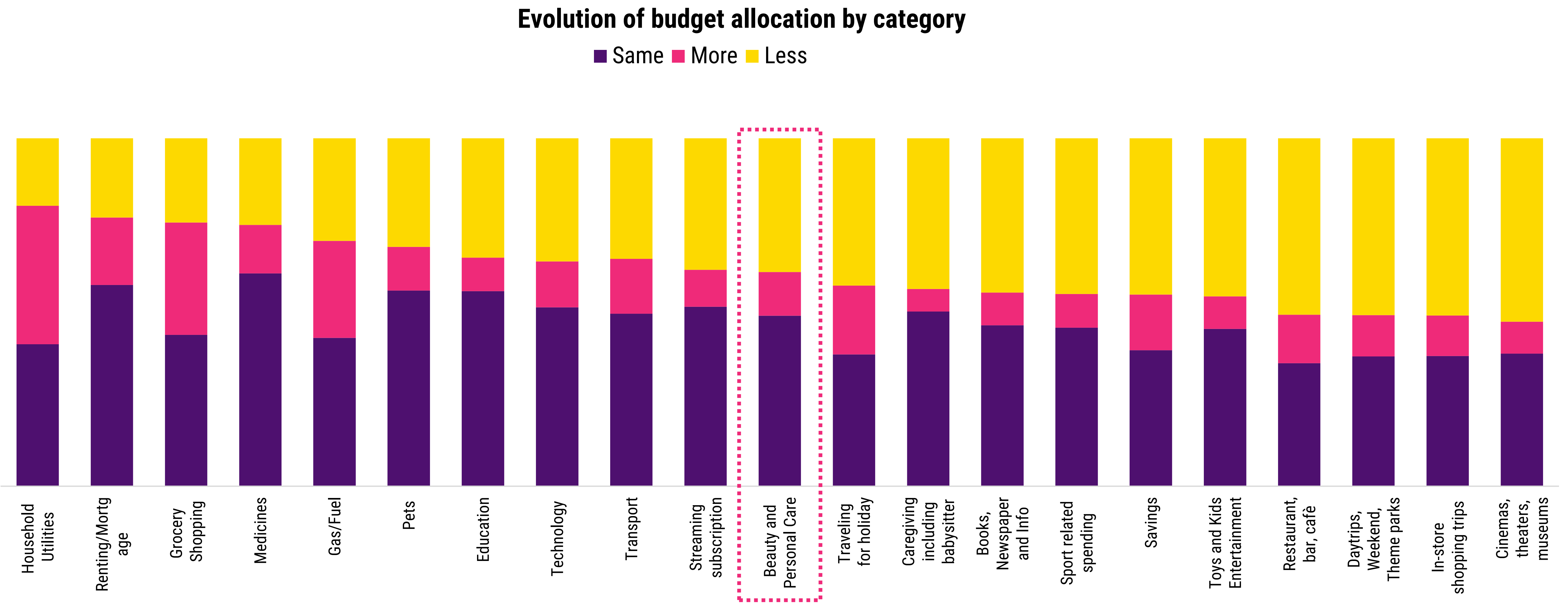


Source: Circana POS Panels EMEA - FMCG and General Merchandising –2024

EUROPE 5

Everyday Expenditure dominates Budgets

Yet, Beauty and Personal Care remains a priority above recreational activities and savings



Q.3. Due to everyday life changes and economic/political/climatic, many consumers have changed the way they spend their money. How did the amount of your income dedicated to each of the following spend change compared to one year ago? *Base: FR n=531, UK n=550, GE n=503, IT n=565, SP n=524, EU5 n=2673 n=524*

Purchasing power changes

Purchasing power is the #1 concern for European people as 43% of respondents are looking for cheaper alternatives

43% Looked for cheaper alternatives for items they wanted / needed — 48%

29% European people did not modify their habits — 31%

17% Delayed some purchases to buy only first necessity — 20%

Q2 Which of the following best describes how inflation has changed your overall shopping behavior during the past 6 months vs year ago?

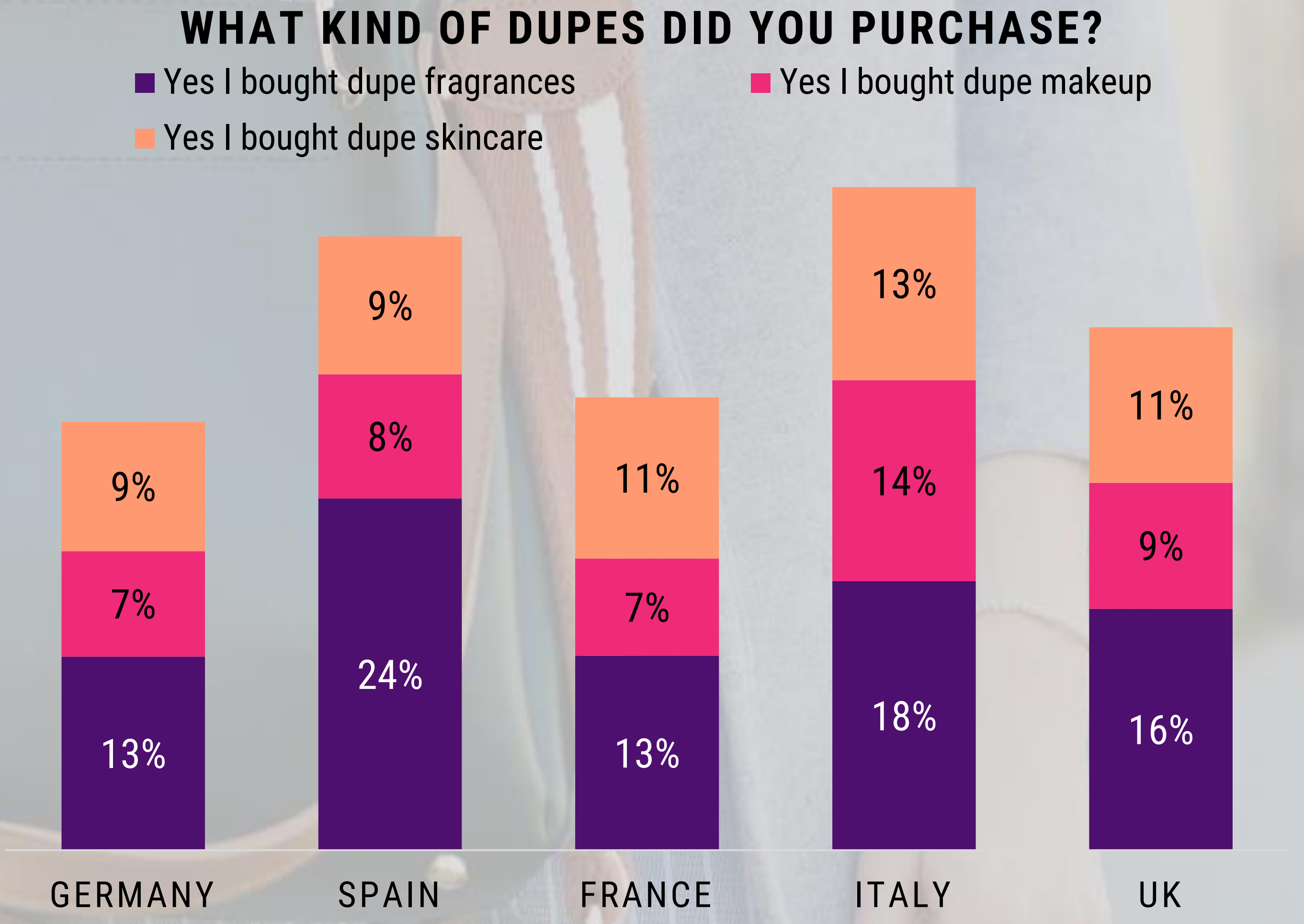
Base: FR n=531, Uk n=550, GE n=503, IT n=565, SP n=524, EU5 n=2683

Circana Post Christmas Consumer Survey – EU5– January 2025

29%

have purchased "dupes/copy" for beauty
vs. **25%** Sep 2024

BUT Reached
52% among 18-34
vs. **42%** Sep 2024



Q23. Have you purchased "dupes/copy" for beauty products (skincare, makeup, fragrances)?
A dupe/copy is a "non illegal lower- priced alternative that imitates a higher-end product"
Base: FR n=531, Uk n=550, GE n=503, IT n=565, SP n=524, EU5 n=2683

Circana

Among EU5 consumers, Beauty Specialist is the key channel, followed by multi-category website like Amazon

35%
Beauty Specialist Physical

30%
Multi category Website

22%
General Health and Beauty/ Pharmacy

UK **49%**

20%
Department Stores

19%
Beauty Specialist Online

DE **25%**

18%
Supermarkets

17%
Drug Specialist

ITA **34%**

DE **51%**

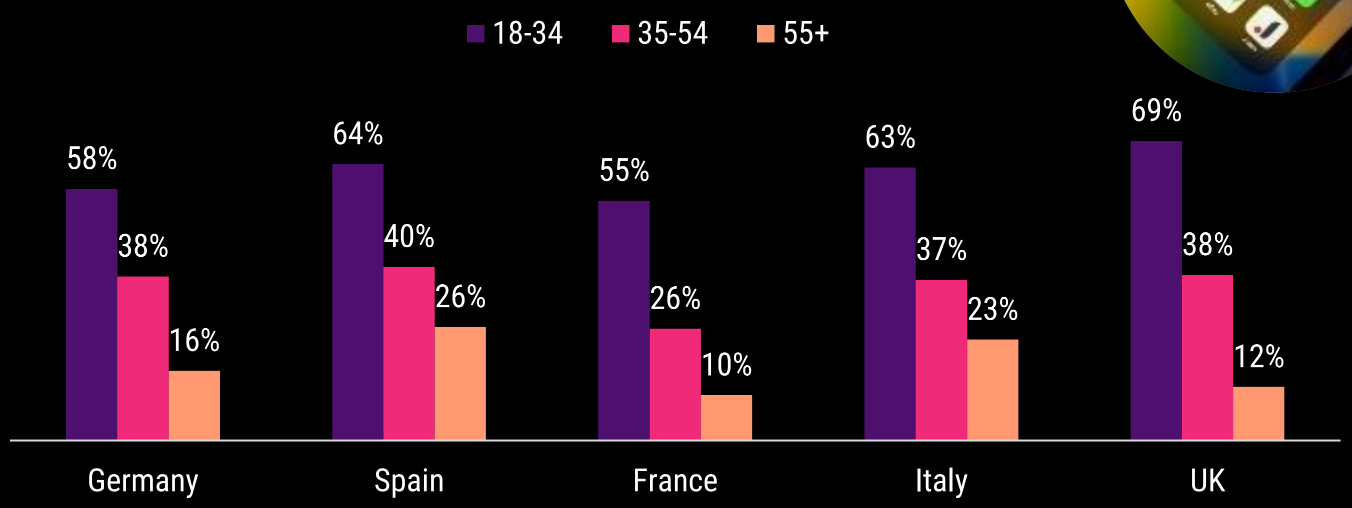
14%
General Health and Beauty/ Pharmacy Online

Circana.

Source: Circana EU5 CONSUMER SURVEY – January 2025
Q.17. Concept 2: During the last 3 months (the festive holiday period), in which retailer type/channel did you purchase your beauty products (fragrance, skincare, makeup)? Please select all that apply. Base: FR n=531, UK n=550, GE n=503, IT n=565, SP n=524, EU5 n=2673

Alternative online platforms remain highly favored among young demographic

Once / More Than Once beauty purchase on Shein, Temu, Aliexpress in the past 6 months
(makeup, skincare, fragrances)



Top researched products in tik tok are purchased in "alternative"websites , apart from Shein, Temu or Amazon platform

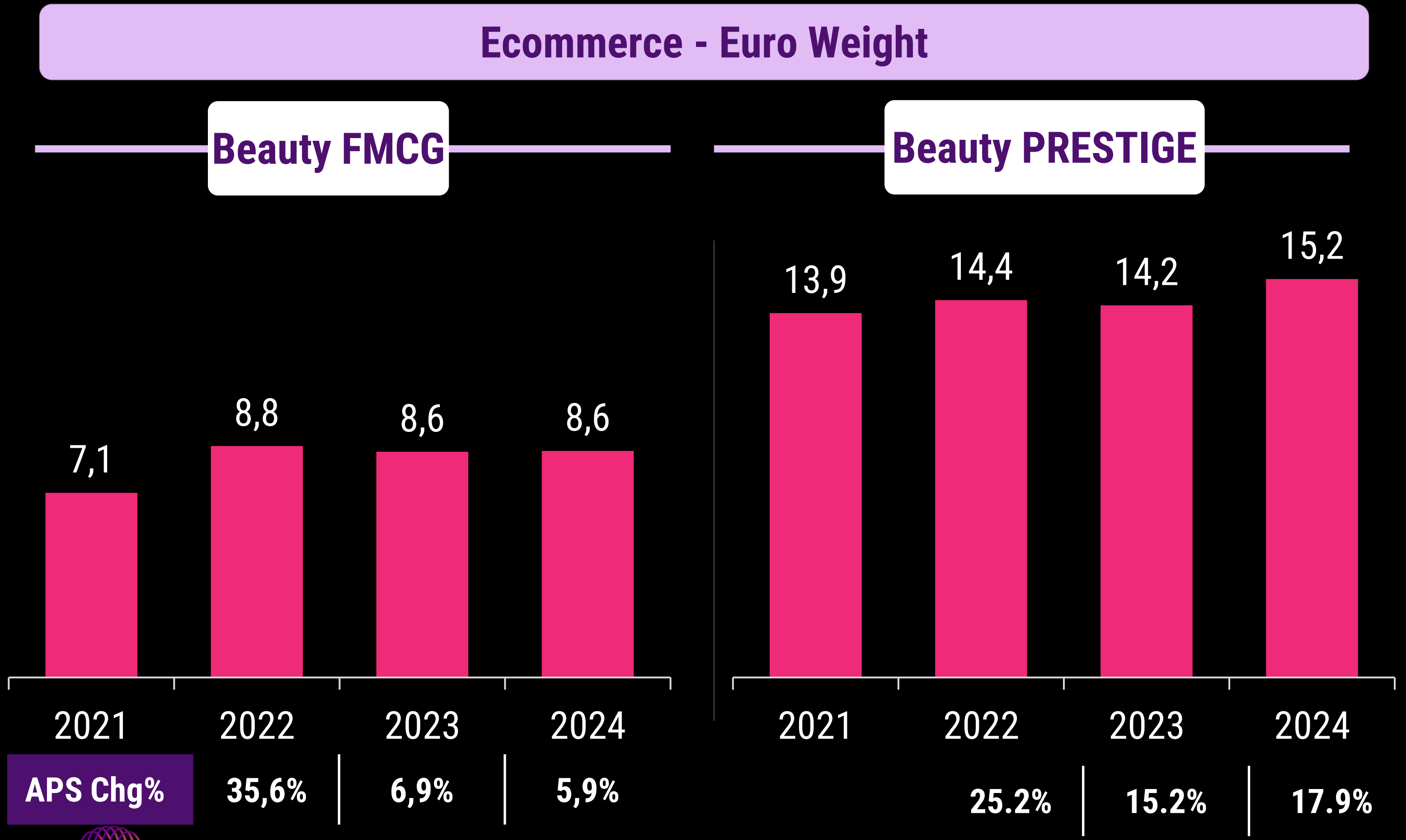
bioboutiquelarosacanina.it

meelovecosmetics.com

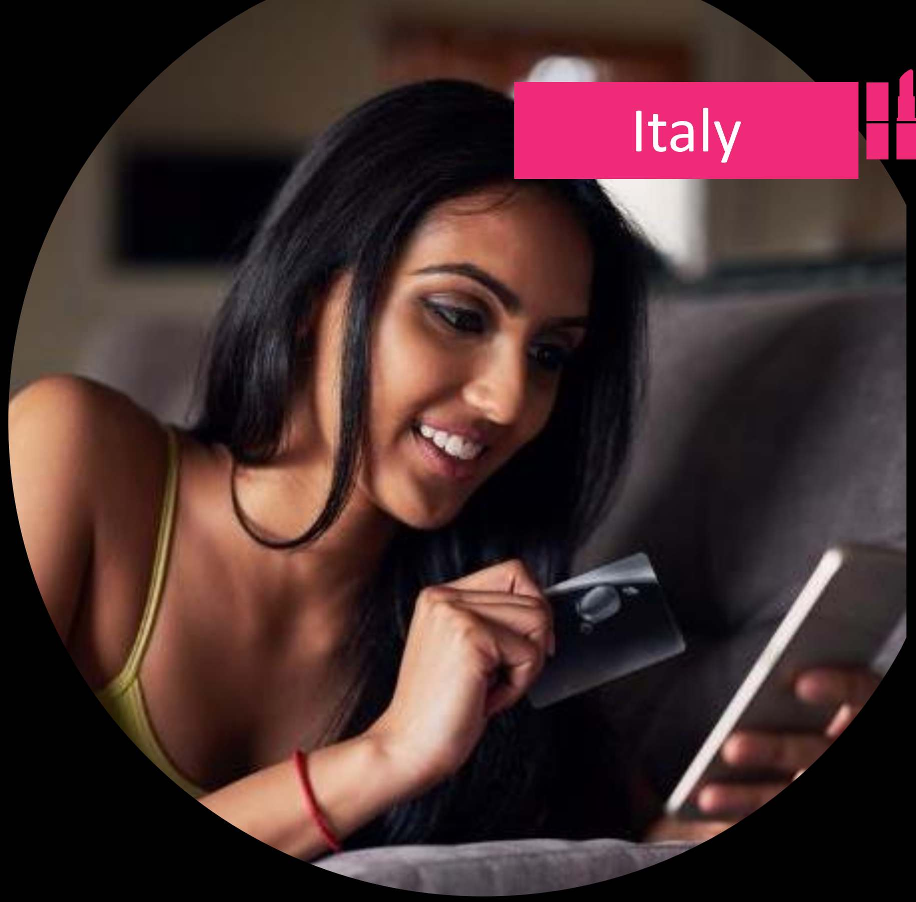
yesstyle.com

Q6 Have you purchased in the past 6 months a Beauty product (makeup, skincare, fragrances) on Shein, Temu, Aliexpress?
Base: FR n=531, Uk n=550, GE n=503, IT n=565, SP n=524, EU5 n=2683

Ecommerce Revamp in Prestige, while stable in FMCG



Italy



Circana.

Source : Circana POS Tracking : Prestige Beauty Panel B&M+Ecommerce / Personal Care POS Panel B&M+Ecom: Fragrance FMCG only Juice (excl Gift Set and Ancillaries and Home Scent); Skincare (excl Oral Care and inlcuded Hygiene)

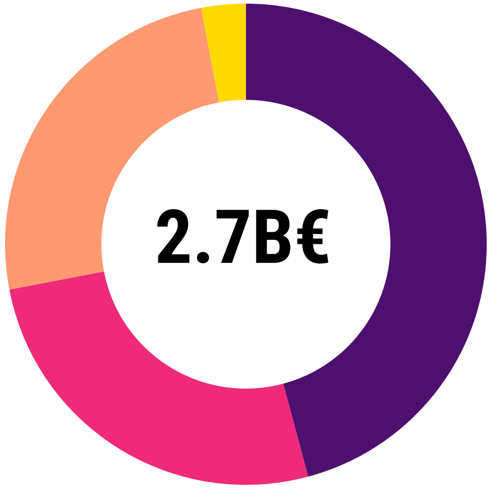
In 2024, Beauty Prestige & FMCG posted a +7% growth vs YA

Fragrances dominate Prestige channel (46%), while Skincare&higiene dominate Beauty FMCG (55%)

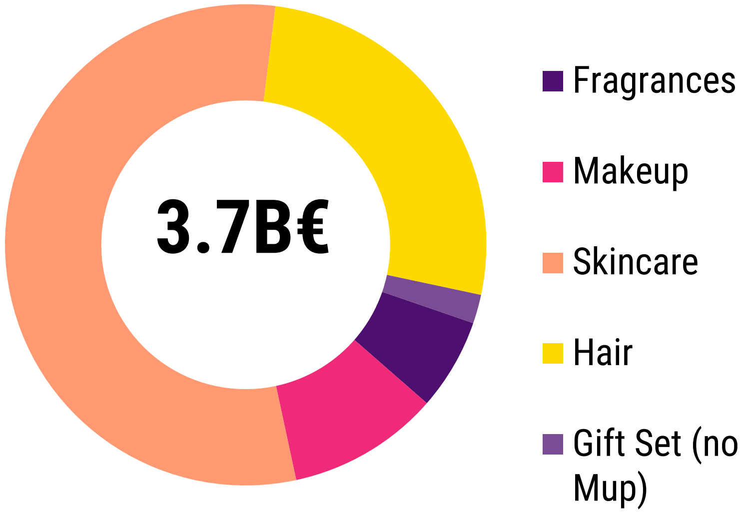
Italy

Value weight of each category (%) - Annual 2024

Beauty PRESTIGE
+10%



Beauty FMCG
+5%



Euro Change% 2024 vs YA

+7.4%

Beauty Prestige & FMCG

Source : Circana POS Tracking : Prestige Beauty Panel B&M+Ecommerce / Personal Care POS Panel only B&M: Fragrance FMCG only Juice (excl Gift Set and Ancillaries and Home Scent); Skincare (excl Oral Care and inlcuded Hygiene)

THE MAGIC OF VIRALITY

Social Media drive Beauty Trend especially among younger target

Social Media/ Influencers are the #1 source of inspiration for Beauty purchase among young target at EU5

35%
Reco from friends

18-34 yo

32%

26%
Social Media

50%

22%
Repeat purchase

23%

22%
TV advertising

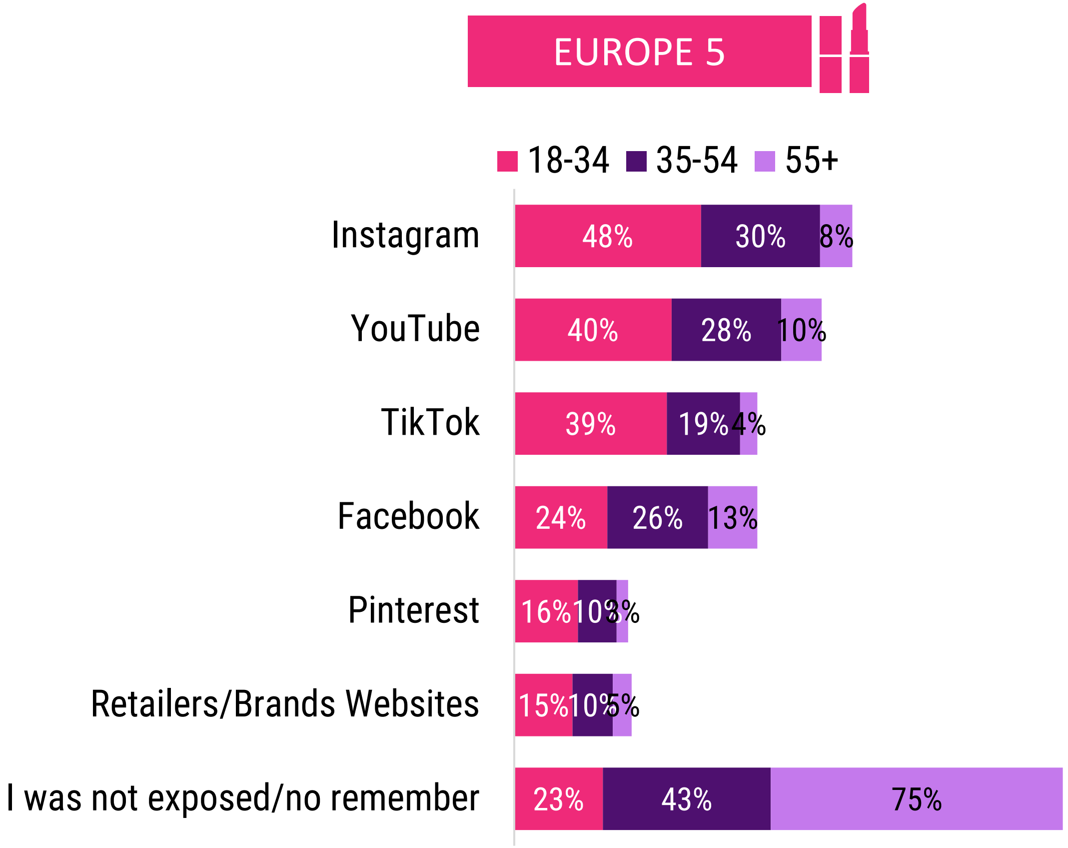
25%

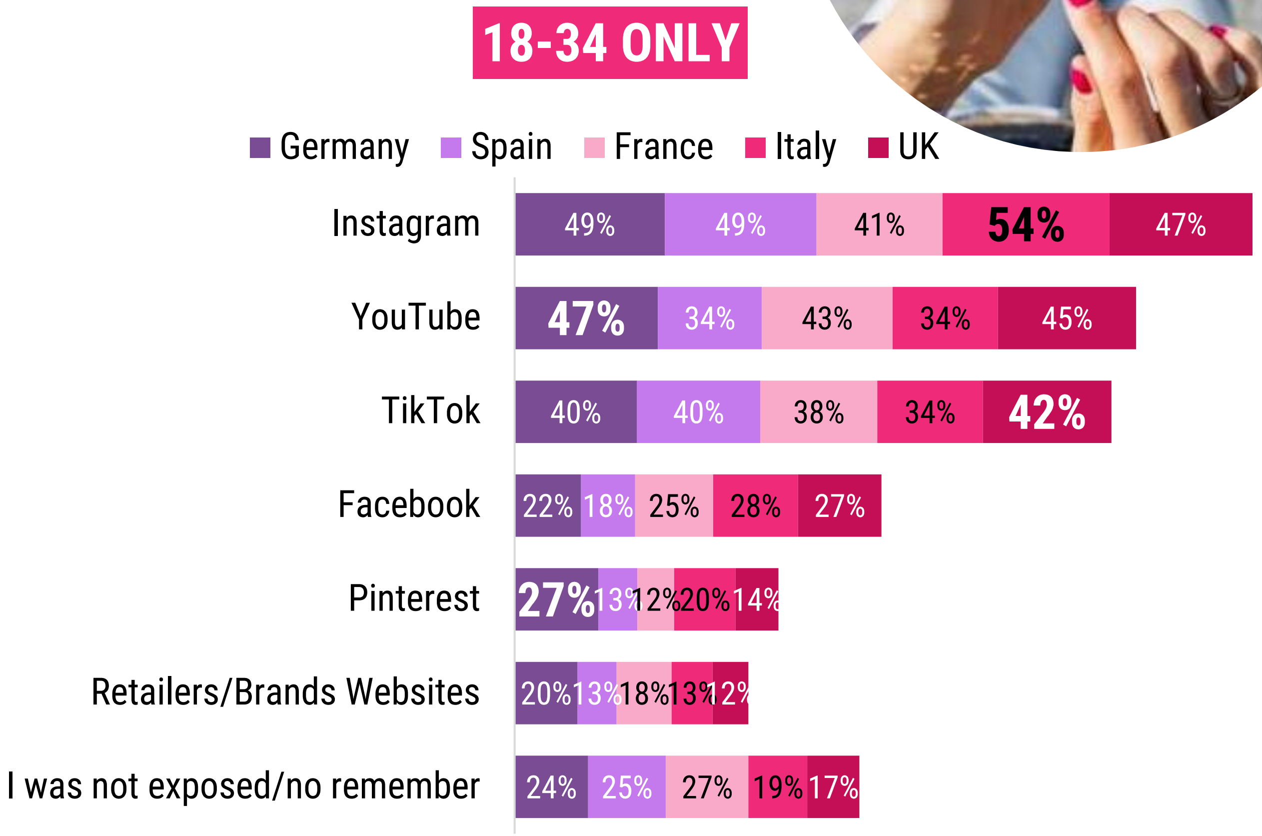
Circana.

Source: Circana EU5 CONSUMER SURVEY – January 2025
Q5 .Where did you get your inspiration for your purchase?
Base: FR n=531, Uk n=550, GE n=503, IT n=565, SP n=524, EU5 n=2673

Instagram, youtube and Tiktok maintain their popularity among Millennials

What platforms did you use to watch Beauty Related content or tutorials on social media?





Circana.

Circana Post Christmas Consumer Survey – EU5– January 2025

Q20 Have you watched any beauty related content or tutorials on Social Media in the last 3 months and if yes, which platforms did you use?
Base: FR n=531, Uk n=550, GE n=503, IT n=565, SP n=524, EU5 n=2683

Beauty Categories Key Insights

In both channels, higher concentrations dominated the growth in Juices

Italy

Juices PRESTIGE / 1M€ (+10% vs YA)

Juices FMCG / 247M€ (+4% vs YA)

Circana.

Source : Circana POS Tracking : Prestige Beauty Panel B&M+Ecommerce /
Personal Care POS Panel only B&M: Fragrance FMCG only Juice (excl Gift Set and Ancillaries and Home Scent);

Ultra-Premium vs. Entry Premium

Only PRESTIGE

Huge polarization of purchases in Fragrances

High concentration (EDP & Perfume)

Niche & Collection

Mini/Small size Juices

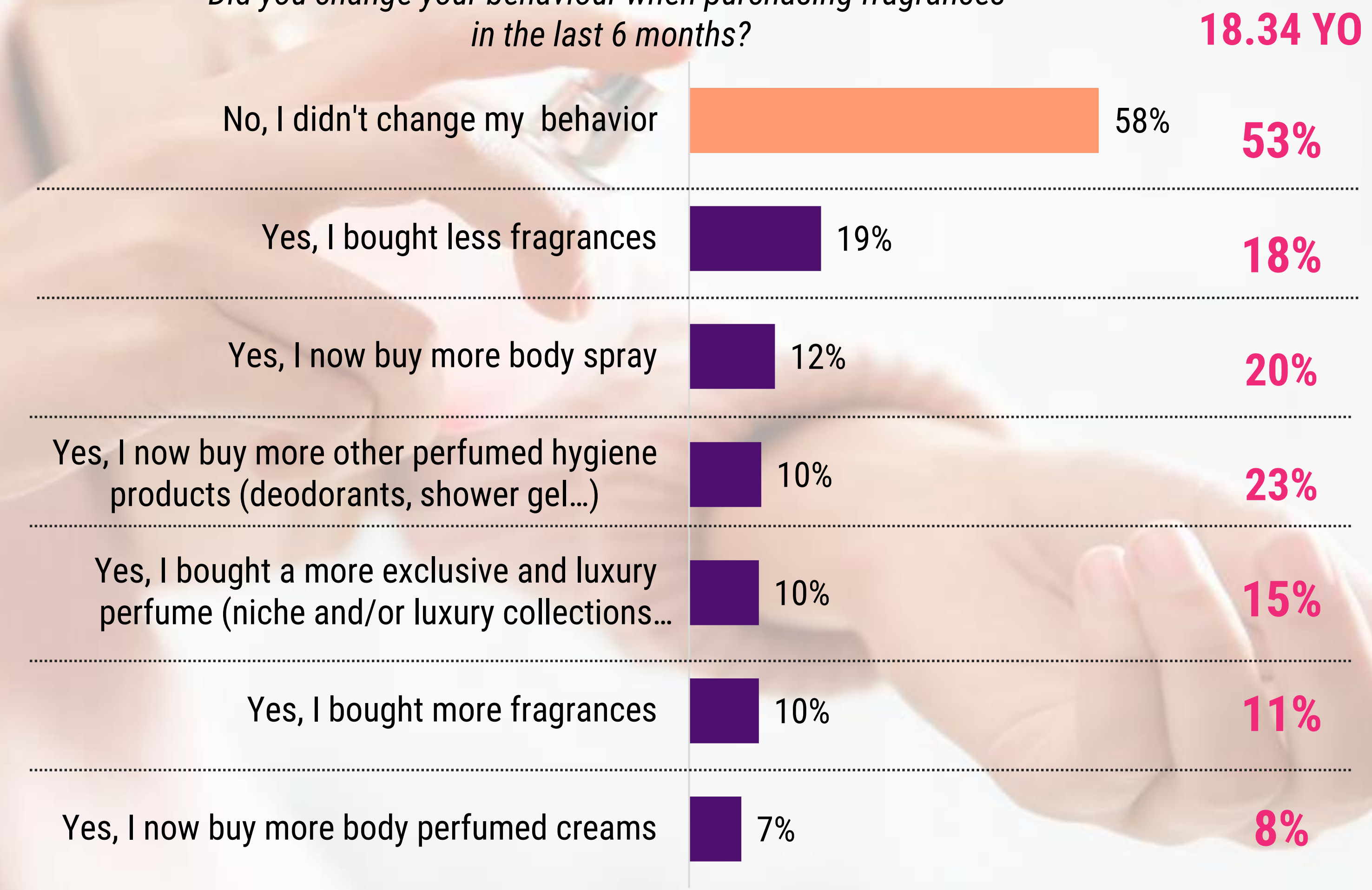
Prestige Body Sprays

Dupes

57% of Italian youngest consumers are changing their behaviour

Trading up
vs
Trading down

Did you change your behaviour when purchasing fragrances in the last 6 months?

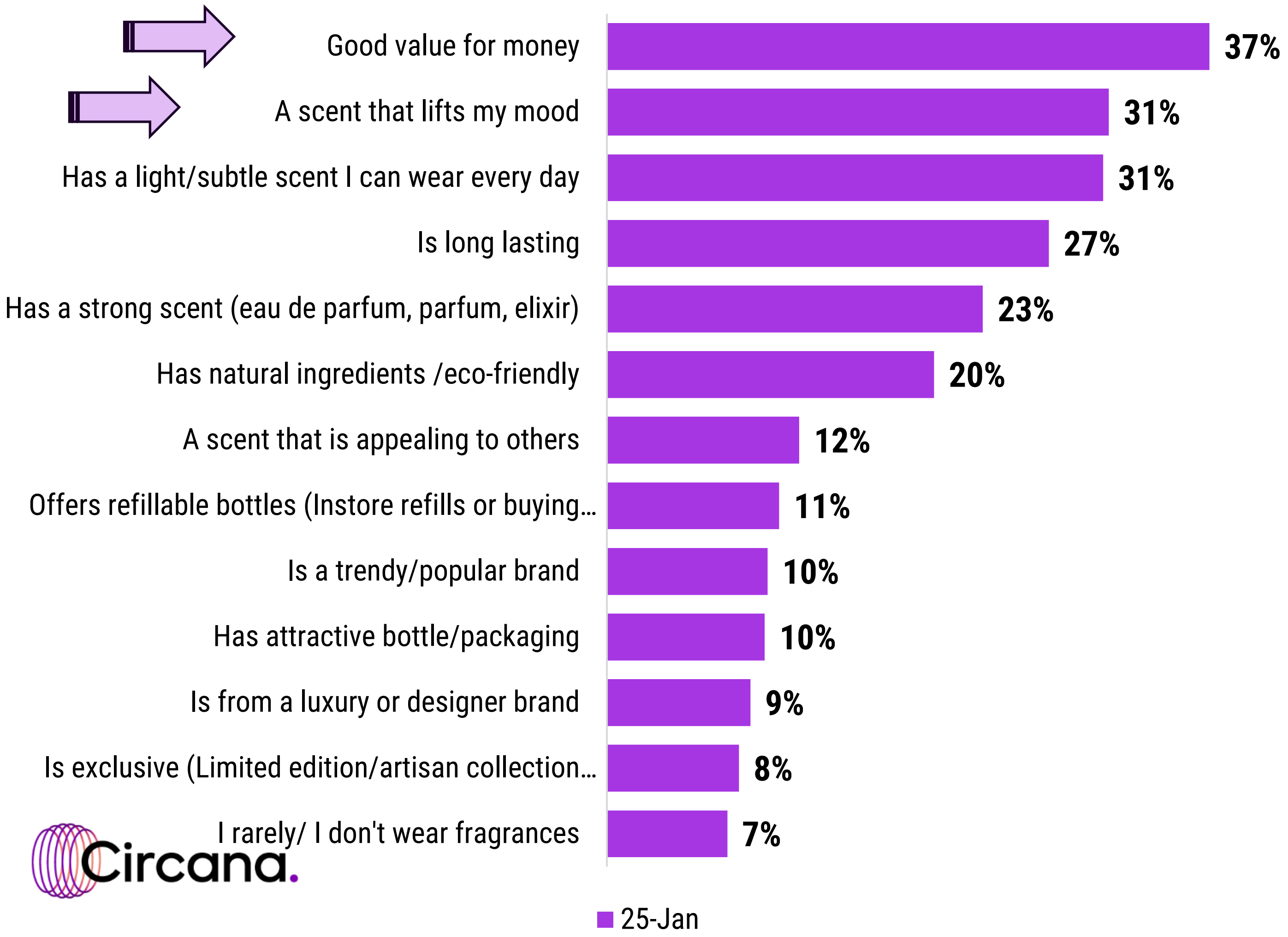


Circana Post Summer Christmas Survey – Italy – January 2025

Q.18. Did you change your behaviour when purchasing fragrances in the last 6 months? Please select all that apply Base: IT=565

Being **good value for** money is a purchase driver, but the wellness eff fragrances gained traction

ITALY

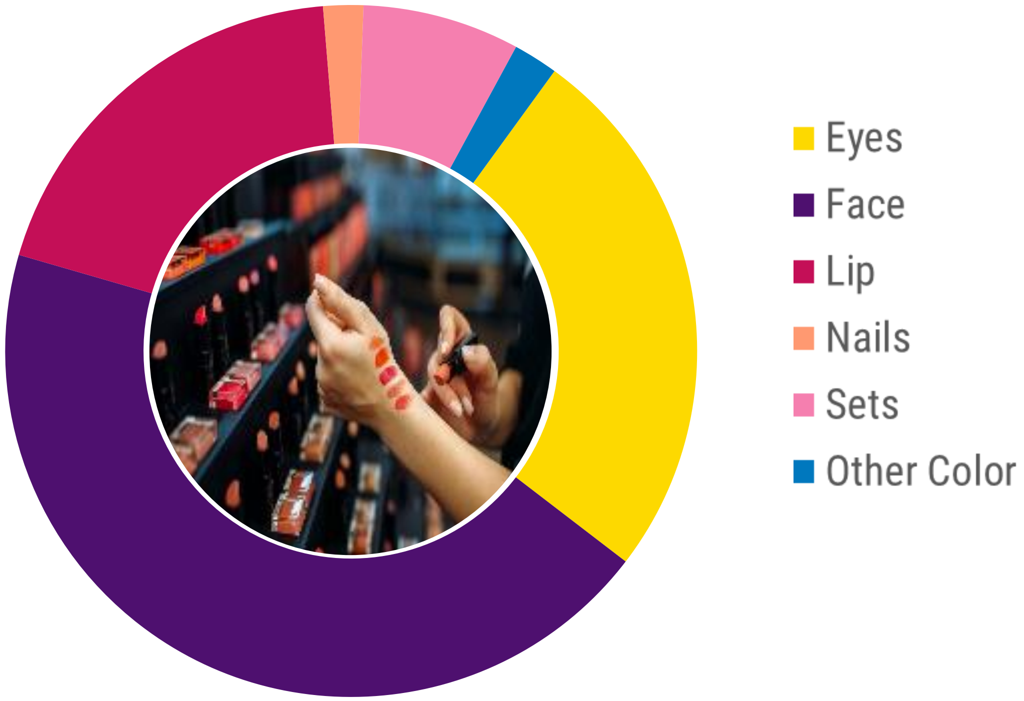


Circana.

Q21 What is important for you when deciding which perfume/cologne to wear?
Base: FR n=531, Uk n=550, GE n=503, IT n=565, SP n=524, EU5 n=2683

Within Prestige and FMCG, Face and Lip drove the growth

Makeup PRESTIGE / 752M€ (+12% vs YA)



Makeup FMCG / 380M€ (+4% vs YA)

Source : Circana POS Tracking : Prestige Beauty Panel B&M+Ecommerce / Personal Care POS Panel only B&M

Which **Makeup** Subsegments are Booming/slowing?

In both channel, Blush, Lips and Other Face showed a higher dynamism, while Foundation and Mascara, even if positive, were slowing.

Blush

Lip Liner

Other Lip and Face Products

Foundation

Mascara

Skincare and makeup are merging to create hybrid products

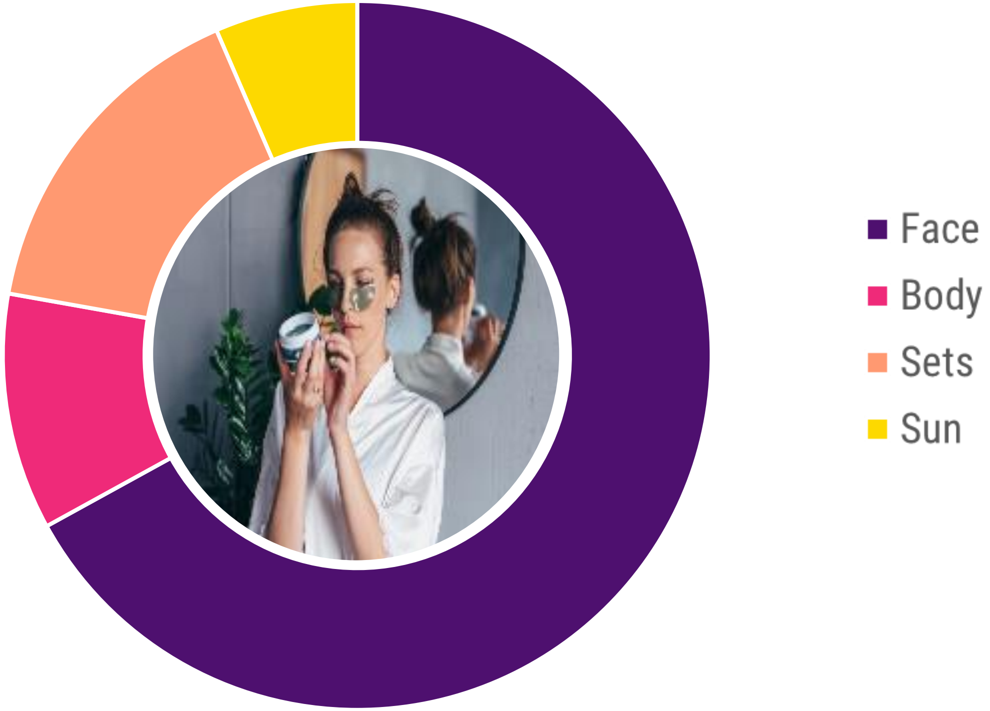
TikTok reinforced the rise of lip care innovations, making products like hydrating lip oils, tinted balms, and skincare-infused glosses must-haves. Lip products are no longer just about color— they now offer hydration, protection, and treatment

- **Hydrating** glosses & lip oils
- **SPF**-infused lip balms
- PH-reactive & personalized lip tints
- Glass-like glosses & **plumping** formulas
- **Active ingredients** like hyaluronic acid, peptides, and antioxidants
- Lip & cheek tints, **gender-neutral** formulations, and **multipurpose**

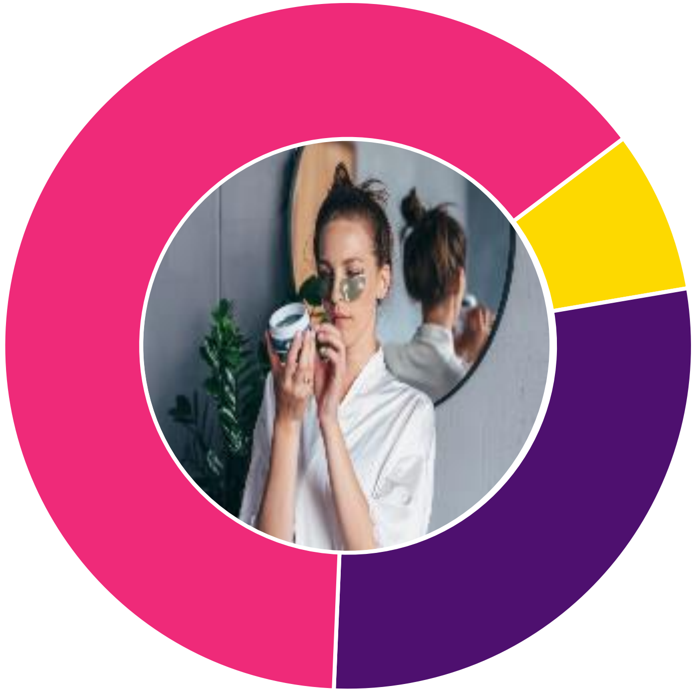
Circana.

Face Skincare was less dynamic than Body & Sun, in both channels

Skincare PRESTIGE / 692M€ (+5% vs YA)



Skincare FMCG / 2.064 (+5% vs YA)



Source : Circana POS Tracking : Prestige Beauty Panel B&M+Ecommerce / Personal Care POS Panel Only B&M: Skincare (excl Oral Care and inlcuded Hygiene)

Which **Skincare** Subsegments are Booming/slowing?

In both channel, Lip products, Body and Sun segments posted strong increased, while Face segments like Serum& Mask are booming only in FMCG.

Lip

Body segments

Sun segments

Face Serum and creams for mature skin

Face Mask

Hair was the most dynamic category in both channels

Haircare Prestige
89,9M€/5,5M units

AVG Price 16.3€

Value **+24,2%** | Volume **+14.2%**

Avg Price

+8.7%

Haircare FMCG
983M€/297M units

AVG Price 3€

Value **+7,1%** | Volume **+3%**

Avg Price

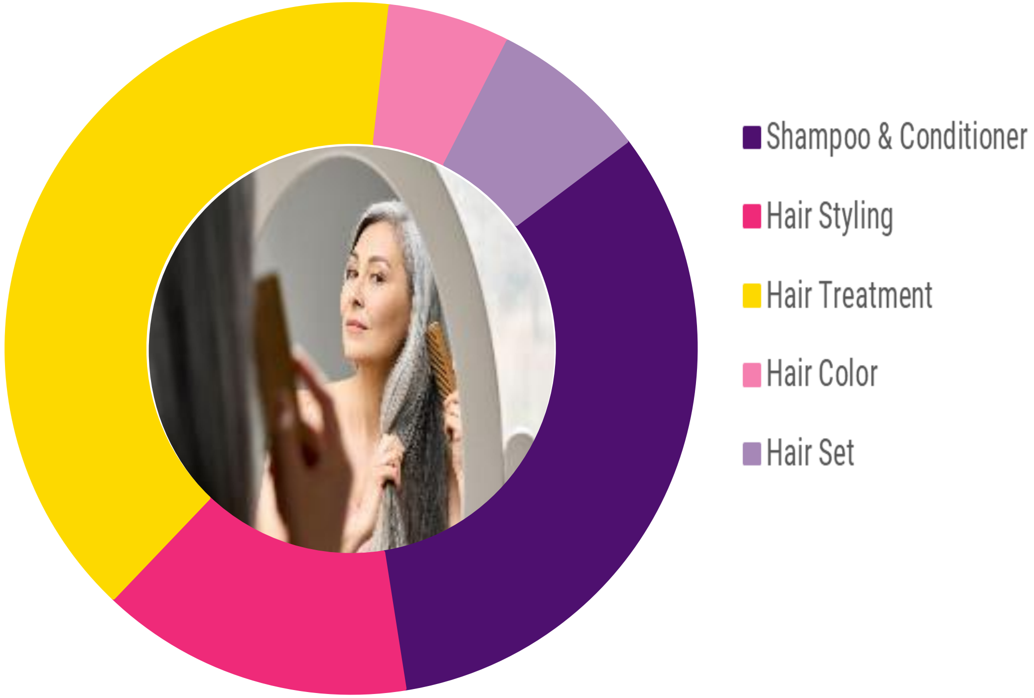
+3.9%

Source : Circana POS Tracking : Prestige Beauty Panel B&M+Ecommerce / Personal Care POS Panel Only B&M

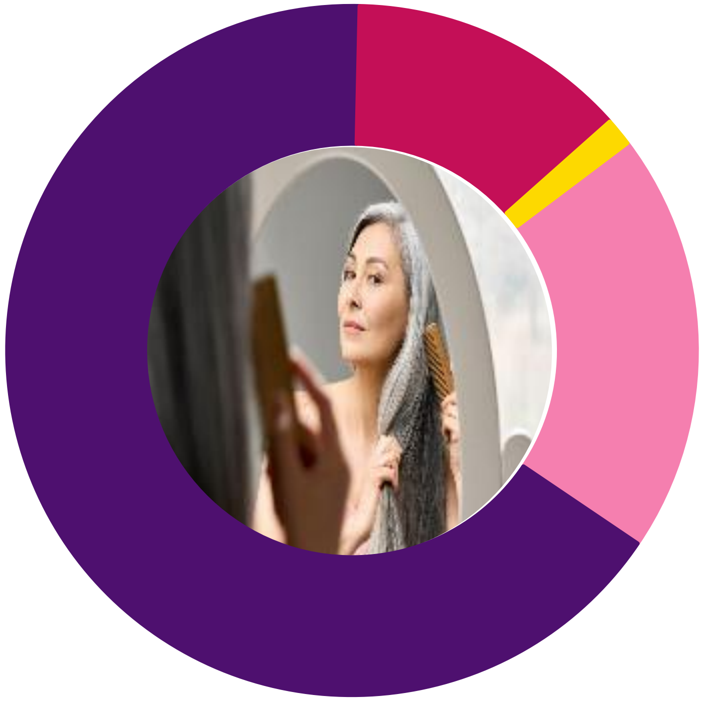
Hair Prestige booming thanks to Hair Treatment and styling

Italy

Hair PRESTIGE / 90M€ (+24% vs YA)



Hair FMCG / 983M€ (+7% vs YA)



Source : Circana POS Tracking : Prestige Beauty Panel B&M+Ecommerce / Personal Care POS Panel Only B&M

Thank you

Circana.