

# Prestige Beauty Overview

October update

**Sylvie Cagnoni**

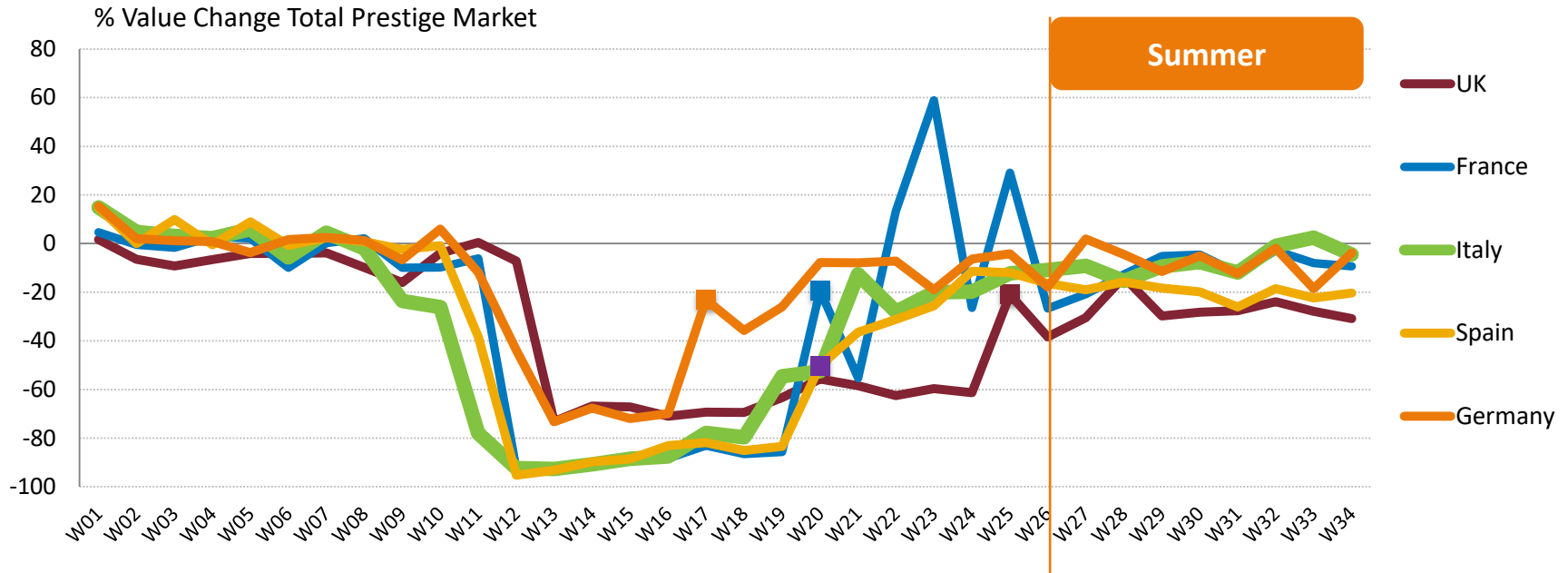
**Director, Beauty Prestige Italy**

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# Total Prestige Market Evolution 2020 Europe 5

La Germania, Francia e Italia sono ora abbastanza allineate. Spagna e UK sono le più lente nel recupero.



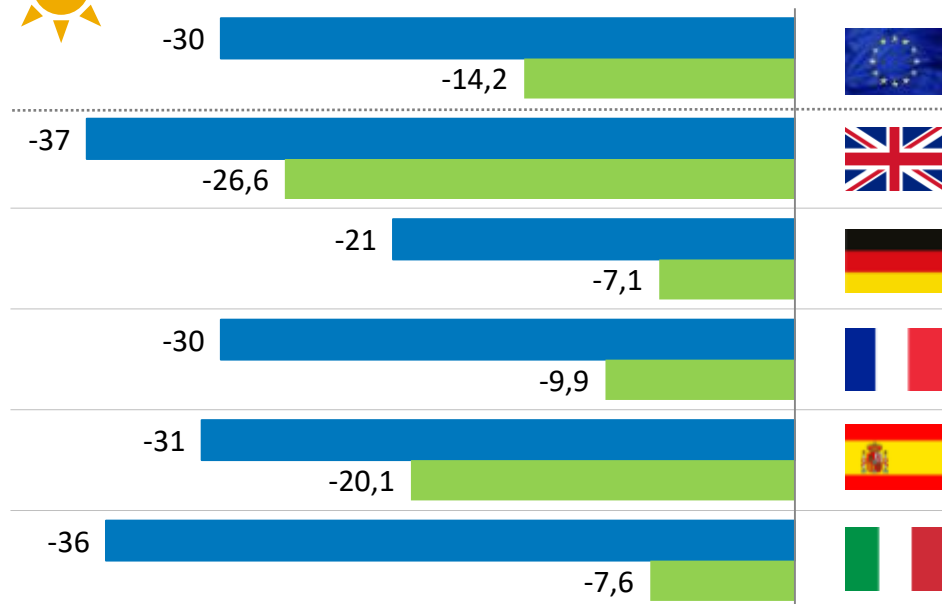
Perimeter: B&M + ECM

# And during summer\* ?

I trend dell' E-commerce ancora positivi ma meno dinamici specialmente per l'Italia e la Spagna.



Value% change **BM + ECM** – Total Beauty



■ YTD June 20 ■ Summer\* 20

E-commerce Value% chge  
YTD June 2020 Summer 2020



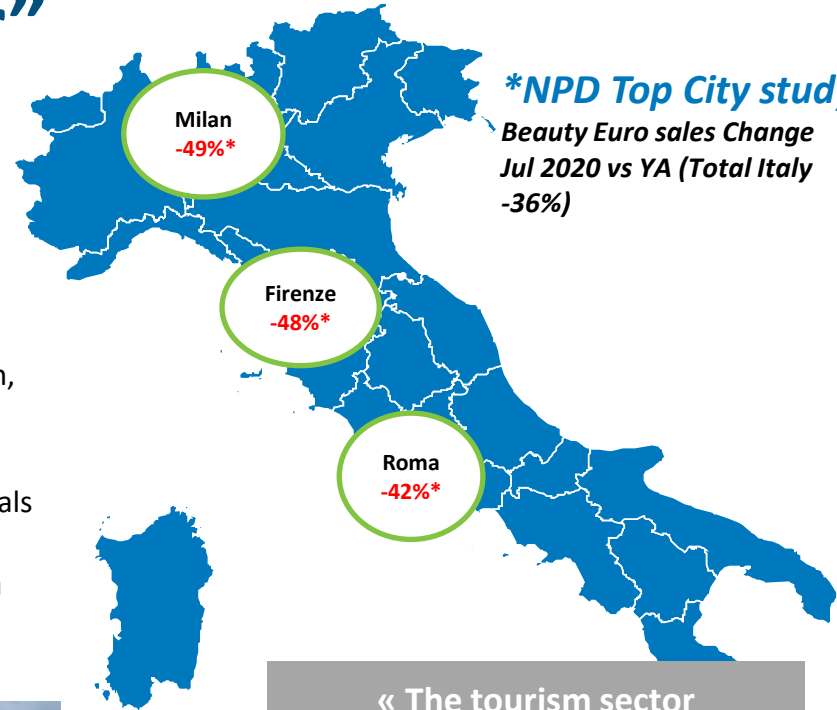
+36,8%		+35,0%
+28,5%	↑	+48,5%
+24,8%	↓	+16,8%
+36,1%	↓	+27,4%
+147,1%	↓	+61,0%
+113,4%	↓	+74,7%

\*summer = July + August Perimeter: B&M + ECM

# 2020: The “Black Summer”

Transfers of international tourists who visit our cities of art collapse, favorite destinations before the pandemic (Rome, Venice, Milan and then Florence).

- **Non-Italian visitors dropped by -91%** in luxury hotels. Main habitués of these hotels come from markets such as the US, Japan, Russia, Australia, Brazil and China.
- **Flights: International arrivals** from abroad in QTR July-Sept. down by **-87%**. Projections for all 2020 in terms of international arrivals in Italy is aligned with France and Western Europe average (-52%).
- **Made-in Italy shopping** linked to foreign tourists will result in 5,7 billion losses.



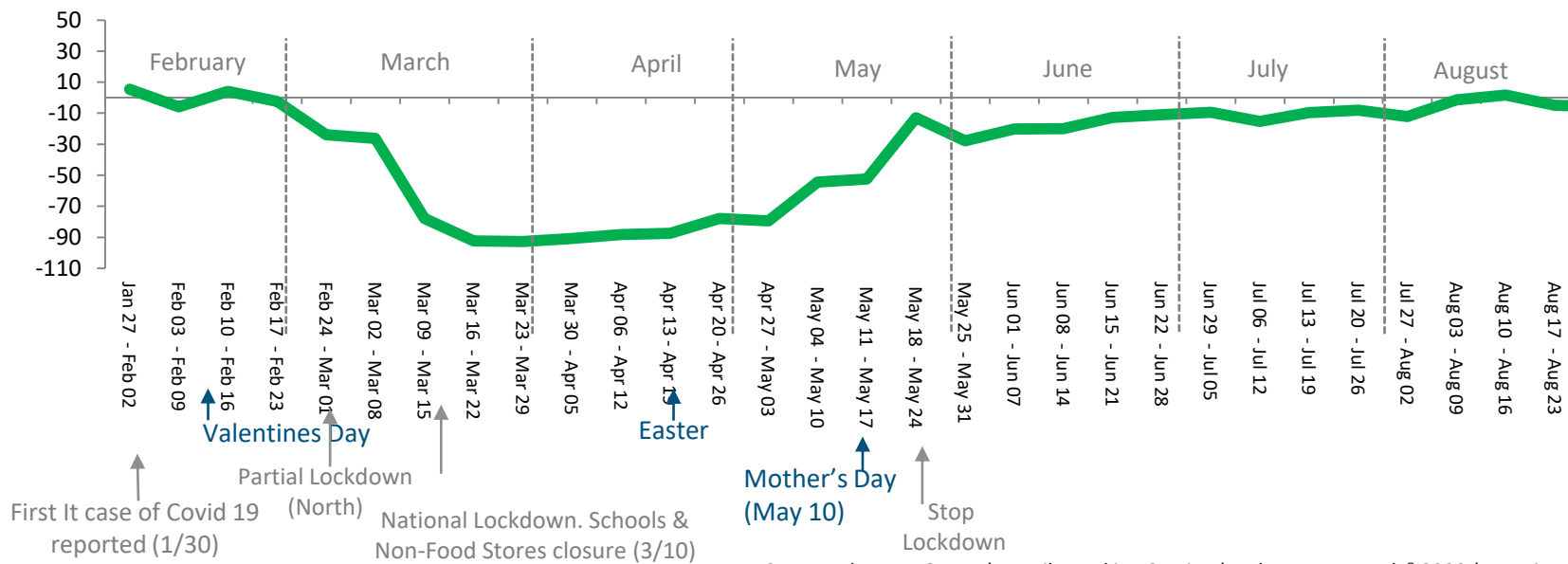
« The tourism sector contributing to 13% of GDP is one of the hardest hit by the pandemic »

# Italy - Weekly € Sales Trend Total Beauty



Osserviamo un recupero ininterrotto settimana dopo settimana fino alla fine di agosto.  
YtD Aug-20 il mercato flette complessivamente del -29%

% change in value 2020 vs 2019

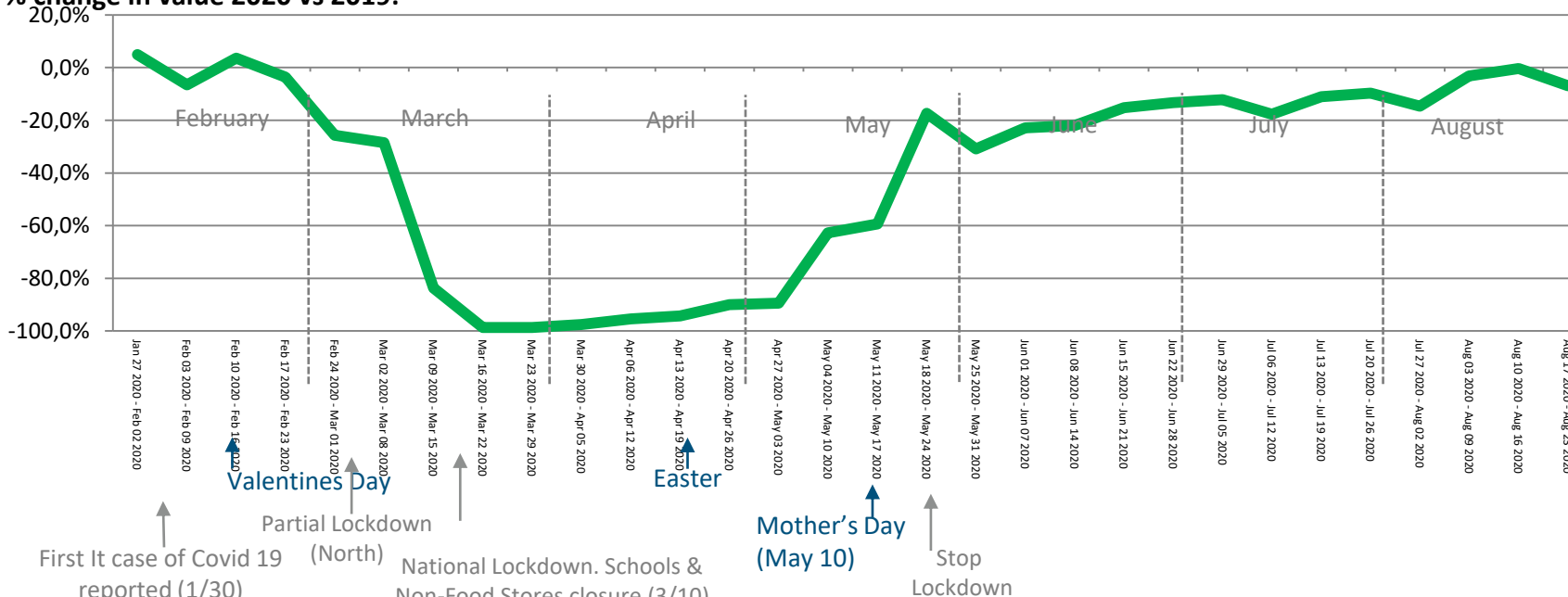


Source: The NPD Group | Retail Tracking Service | Italy BeautyTrends® 2020 | Prestige & Mass brands

# Italy - Weekly € Sales Trend – B&M

Overall il B&M flette del -33% in YtD Agosto20. Il back to school non favorisce il canale a inizio settembre.

% change in value 2020 vs 2019:



Source: The NPD Group | Retail Tracking Service | Italy BeautyTrends® 2020 | Prestige & Mass brands

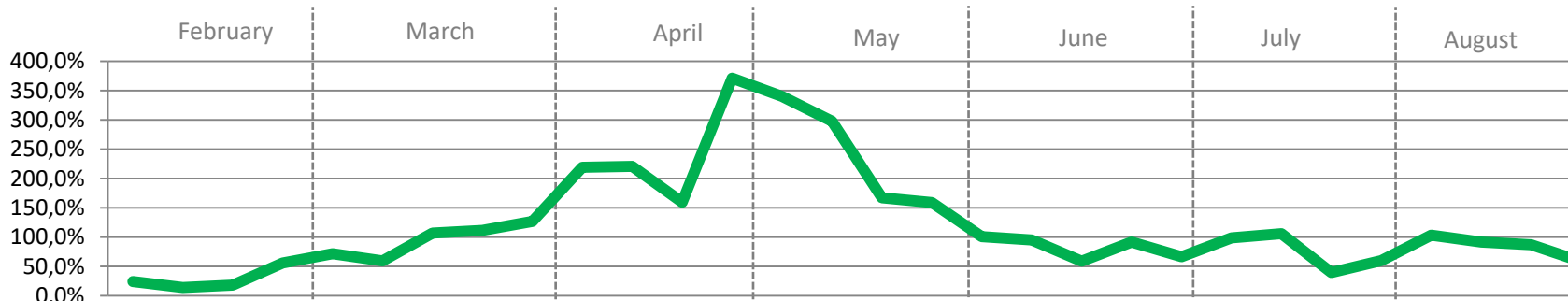
# Italy - Weekly € Sales Trend – B&M



Overall l'e-commerce cresce in YtD Ago20 del +107%.

% change in value 2020 vs 2019:

Ecommerce

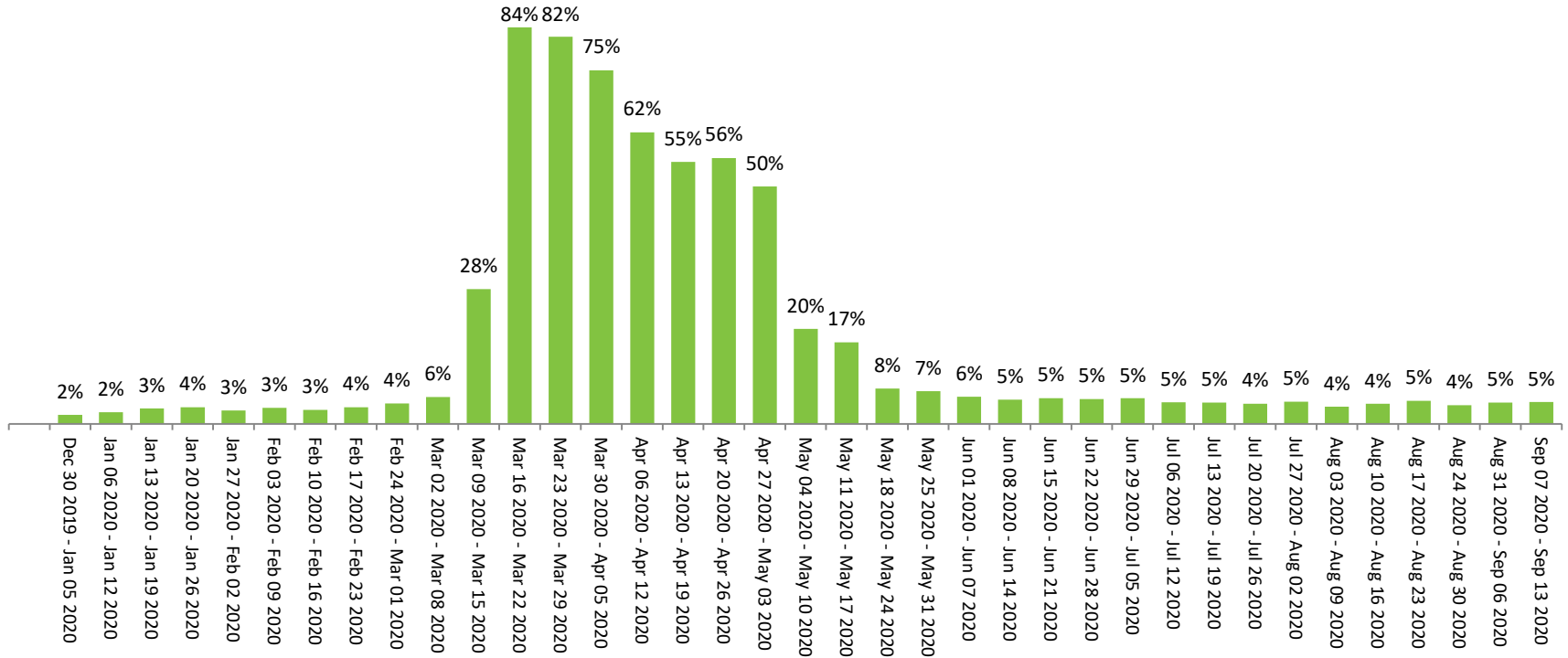


↑ First It case of Covid 19 reported (1/30)  
↑ Valentines Day  
↑ Partial Lockdown (North)  
↑ National Lockdown. Schools & Non-Food Stores closure (3/10)  
↑ Easter  
↑ Mother's Day (May 10)  
↑ Stop Lockdown

Source: The NPD Group | Retail Tracking Service | Italy BeautyTrends® 2020 | Prestige & Mass brands

# Online € sales weight – 2020 vs 2019

E si è stabilizzato al 5%, raddoppiando il suo peso mese su mese YA.

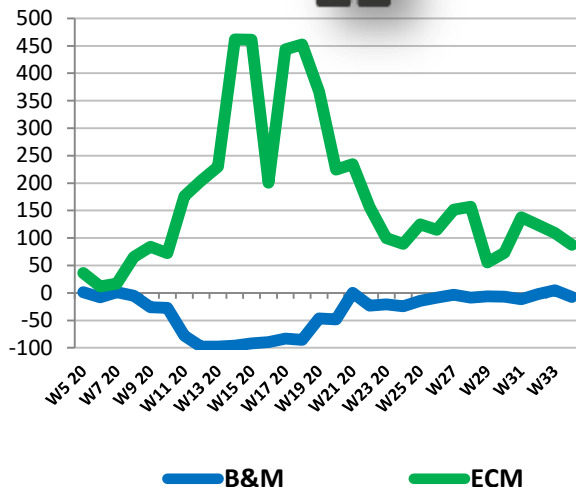
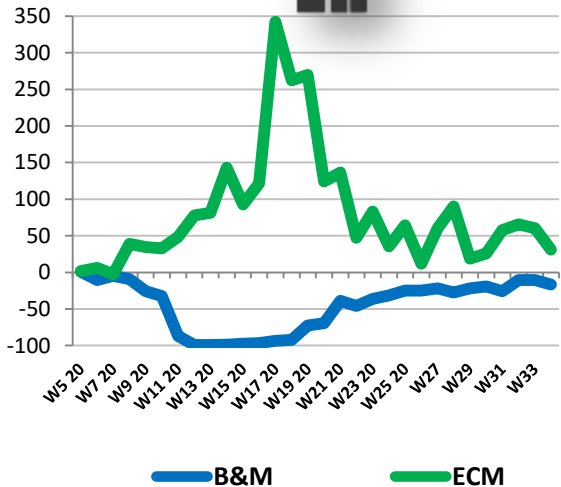
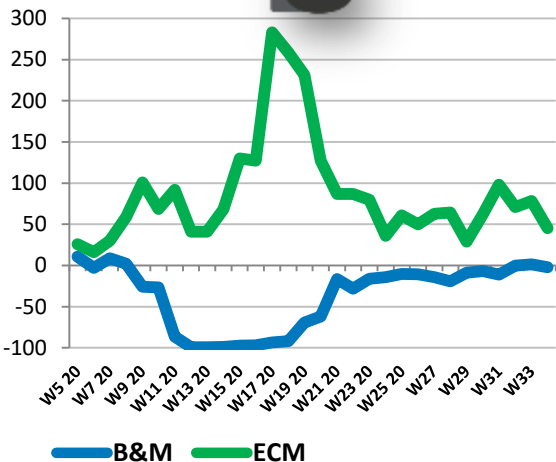
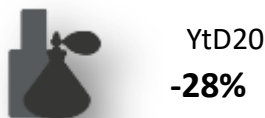




# Weekly trend per channel type & per category

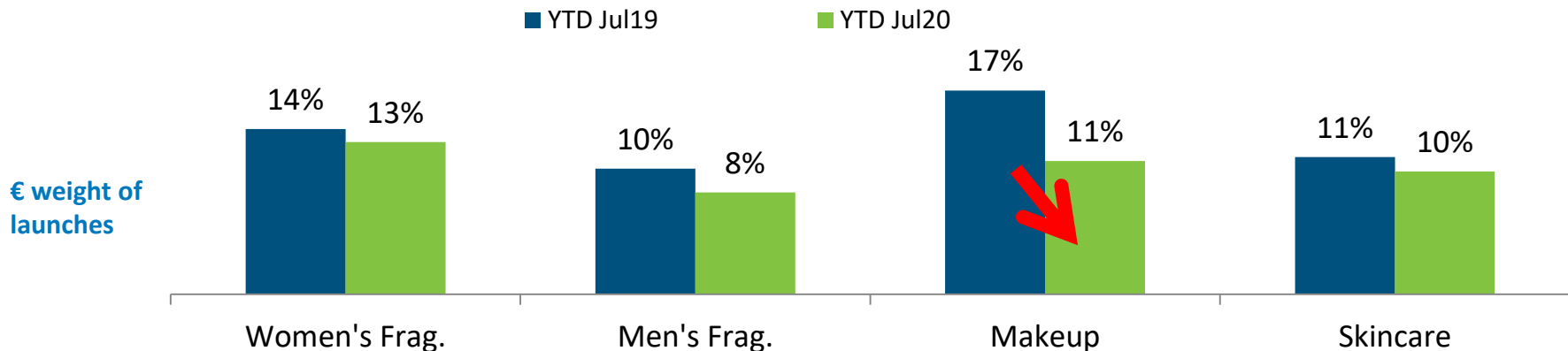
Lo Skincare conferma la sua maggiore resilienza, le Fragranze mostrano un recupero già dalla Fase 2, mentre il Make up più lento nel recupero complice anche un minore contributo dell'innovazione.

% change in value 2020 vs 2019:



# Innovation by categories YTD July 2020

Il Make up ha subito il maggior calo sia nell'Innovazione che nei prodotti existing.  
Skincare e Fragranze mostrano invece un peso dei lanci più in linea con lo scorso anno.



Euro %chg vs YA

	Women's Frag.	Men's Frag.	Makeup	Skincare
New	-37%	-44%	-61%	-35%
Existing	-31%	-30%	-36%	-27%
Total	-32%	-31%	-40%	-28%

Lines launched in the last 12 months (Aug-Jul) – Value YTD July 2020

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# THANK YOU

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