



# Mappe del Beauty Contemporaneo

profili, abitudini e trend emergenti

Cosmoprof, 27 marzo 2026

Copyright 2025 Circana, LLC ("Circana"). All rights reserved. Circana, the Circana logo, and the names of Circana products and services are trademarks of Circana. All other trademarks are the property of their respective owners.



# Welcome



**Marco Pellizzoni**

Commercial Director | YouGov



**Alessia Ceriani**

Beauty Director Italy | Circana

# Beauty & Personal Care continues to deliver good performance across the retail market

## Complete Beauty\*

+2,6% in value (flat in units)



+5.4%

Circana **Prestige**

2.349 M€



+1.2%

Circana **Grocery**

4.070 M€



+2.2%

New Line **Pharma**

2.040 M€

# 5 Beauty Key drivers 2025

## Beauty resilient

Beauty stays resilient, but **momentum is softening due** to economic uncertainty and lower consumer spending power

## Omnichannel consumer behaviour

Consumers increasingly move across channels, **trading up and down** to balance aspiration and affordability

## Ecommerce Momentum

**Ecommerce continue to accelerate**, driven by strong promotional activity and broader assortments

## Purchase Drivers

Shared across generations, but Gen Z stand out with distinct behaviours – with **AI becoming a defining influence**

## New Trend

**Emerging brands and new beauty rituals** disrupt traditional leaders: K-Beauty, Derma, C-Beauty, Beauty Tech, Longevity, Exclusives and Private Labels



# Indeed, we observed an increase of penetration and purchase frequency of Beauty category

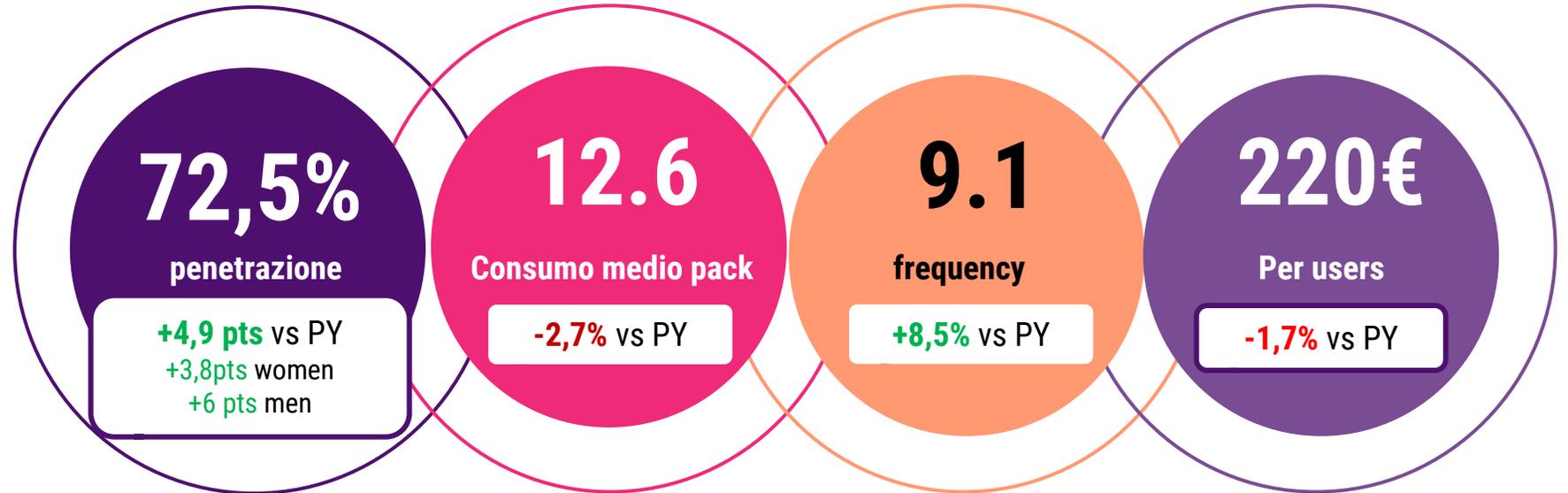
**42,8**  
**mio users**



**62% users**  
**Women**



**38% users**  
**Men**



**Women 55-64 yo** are the most penetrated group (97,8%) and the target with the highest volume per buyer: 21 packs in a year

MAT December 2025

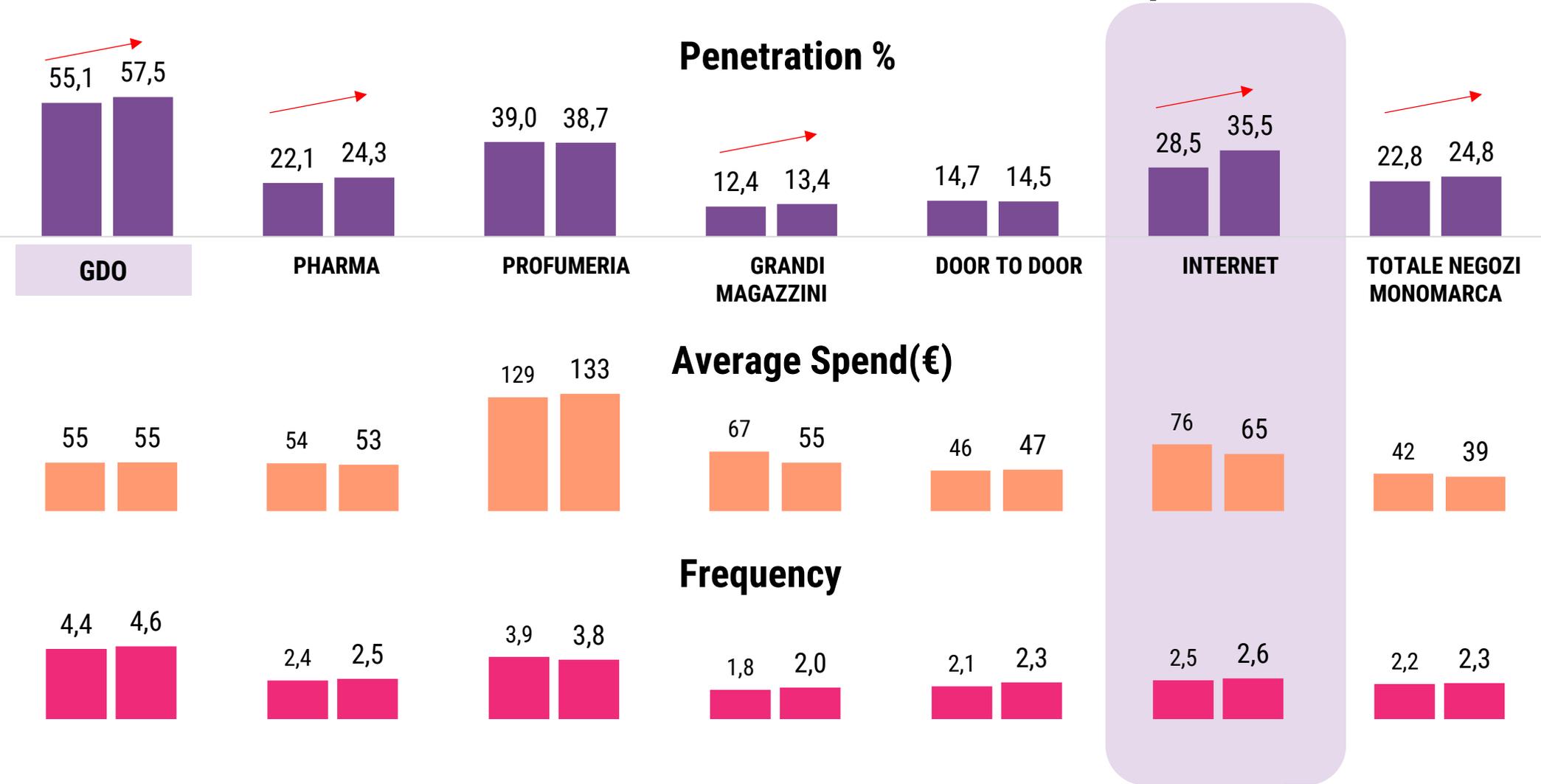
\*Make up + Skincare Face + Skincare Body + Fragrances

YouGov Beauty Care Tracking



Circana, Inc. and Circana Group, L.P. | Proprietary and confidential

# Multichannel behavior is becoming increasingly evident: penetration of ecommerce is the most dynamics channel



Perimeter: MakeUp, Skincare Face/Body, Fragrances

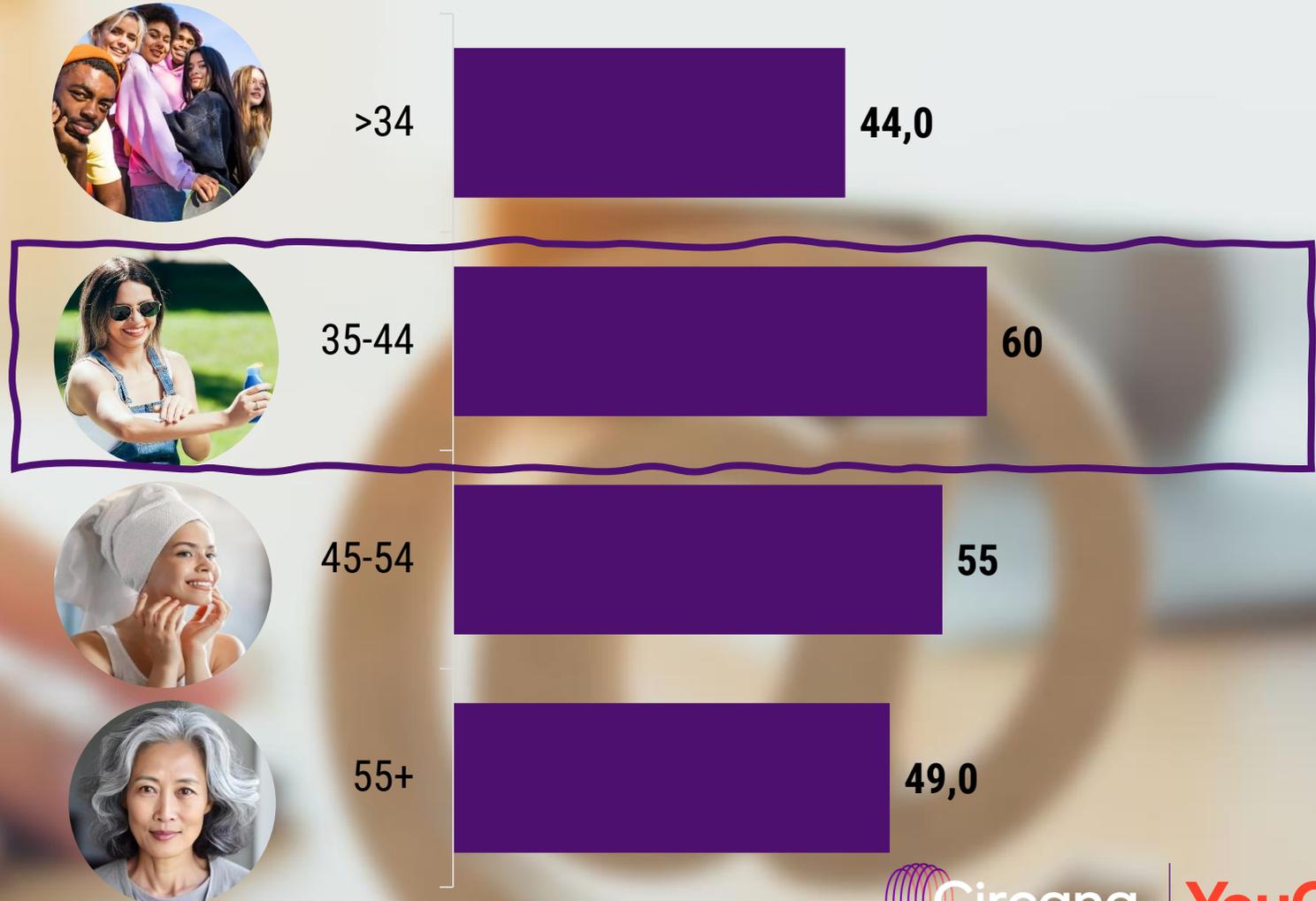
YouGov Beauty Care Tracking: weekly individual-level interviews track end-user consumption, based on a continuous sample representative of the Italian population.

YouGov Beauty Care Tracking 2025



## Internet Penetration %

■ MAT December 2025



**Internet** shows a higher penetration among women 35-44. But almost one out of two 55+ women has chosen the online channel to buy their Beauty products

# Top 3 Drivers for Online Beauty Purchases

**35%**

## Better Prices

Online stores offer lower prices than in-store.

**31%**

## Wider Selection

There is a larger variety of products available online.

**31%**

## Discounts & Promotions

Consumers frequently find discounts or promo codes online.



18-34

**34%**

**40%**

**37%**

**20%** of 18-34 yo chose “**Exclusive products**” as a reason for buying beauty online, vs only **6%** of 55+

# Search for affordable options

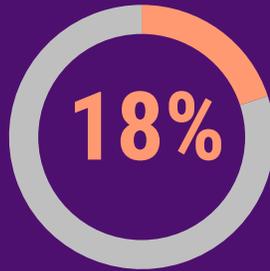
'Search for value' is still important to Italian consumers, who have made this behavior part of their daily routine.

**31%**

Of Italians say their shopping behaviour has **not changed**



Looked for **cheaper alternatives**



**Delayed** unnecessary purchases



Looked for **promotions** for the items they wanted



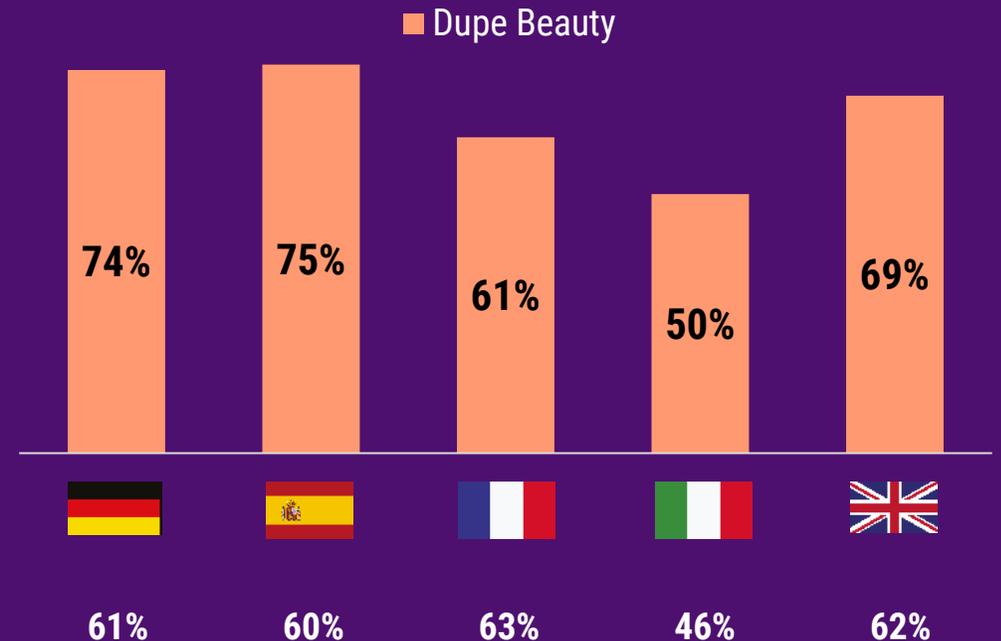
# Dupe culture gains momentum among younger consumers, especially in Spain and UK.



BUT reached **67%** among 18-34

% are satisfied with 'dupes' purchase

## 18-34 ONLY What kind of Dupes did you purchase?



# Beauty Purchases Drivers

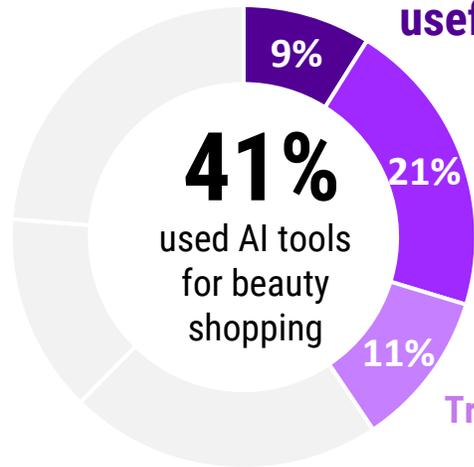
All age groups are mostly driven by sampling and repeat purchases, while differences in types of advertising as drivers.



Age 18-34	Age 35-54	Age 55+
<b>35% Samples</b>	<b>33% Samples</b>	<b>34% Samples</b>
23% Repeat Purchase	25% Repeat Purchase	24% Repeat Purchase
21% Display in Store	25% Display in Store	21% Staff in Store
21% Staff in Store	22% Staff in Store	20% Display in Store
19% Advertising on Social Media	21% TV Advertising (live or streaming)	15% Magazines/Catalogs/Newsletter/Flyer

Italian respondents when purchasing beauty products:  
**19%** among 35-54 were influenced by **Artificial Intelligence** (vs. 6% for 55+)

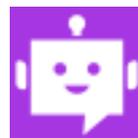
# AI beauty tools gain popularity in enhancing shopping experience



Use them **regularly** and think they are **useful** when shopping

Used them and think they are **interesting but not decisive** when shopping

Tried them but **not convinced** much



Which tool is more used?

**52%** Chatbot, virtual shopping assistant

**25%** Virtual try-on

**22%** Digital analysis of skin/hair type



Source: YouGov survey, February 2026, Italy

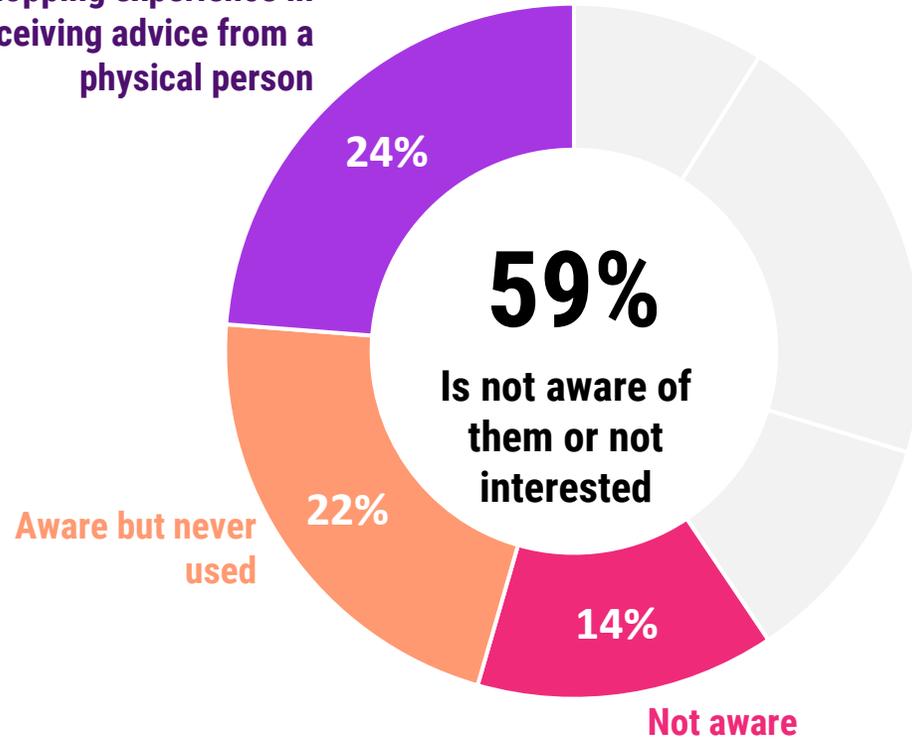
Which of the following statements best describes your experience with AI-based tools (e.g., virtual product try-on, digital skin analysis, chatbots, personalized recommendations...) when purchasing cosmetic/makeup products?

You mentioned that you have used AI-based tools for beauty. Could you tell us specifically which ones you have used

Base: n. 1677 (18+ yo population, personal care/makeup buyers past 6 months), n. 684 (they used AI tools for beauty shopping at least once)

# 24% prefer physical shopping experience over AI

Prefer shopping experience in store / receiving advice from a physical person



Source: YouGov survey, February 2026, Italy

Which of the following statements best describes your experience with AI-based tools (e.g., virtual product try-on, digital skin analysis, chatbots, personalized recommendations...) when purchasing cosmetic/makeup products?

Base: n. 1677 (18+ yo population, personal care/makeup buyers past 6 months)



**Fragrances**

**Makeup**

**Skincare**

# Fragrances grew across all channels with strong Prestige momentum

## Complete Beauty\*

+5.8% in value



Circana **Prestige**

959 M€



Circana **Grocery**

233 M€



New Line **Pharma**

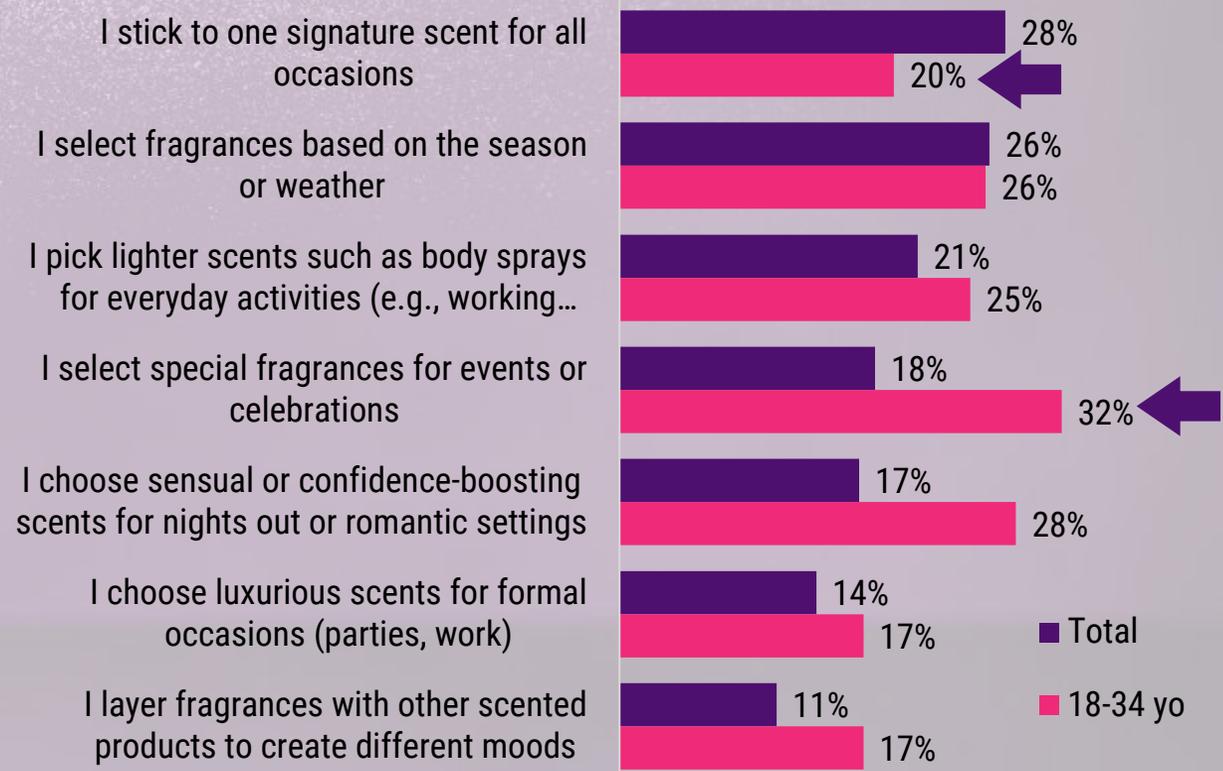
61 M€

# 3 of Italians prefer to stick on one fragrance for all occasions

Younger consumers adapt their fragrance choice more to specific moments, selecting different scents for events, nights out, formal occasions and creating different moods



## Fragrance preferences for different moments



# Fragrance Market Drivers

## Desirable



**High  
Concentration:  
EDP | Perfum  
Intense | Elixir**



**Niche  
Fragrances  
&  
High end  
Collections**

## Affordable



**Masstige  
Brands  
  
Dupe  
Phenomenon**



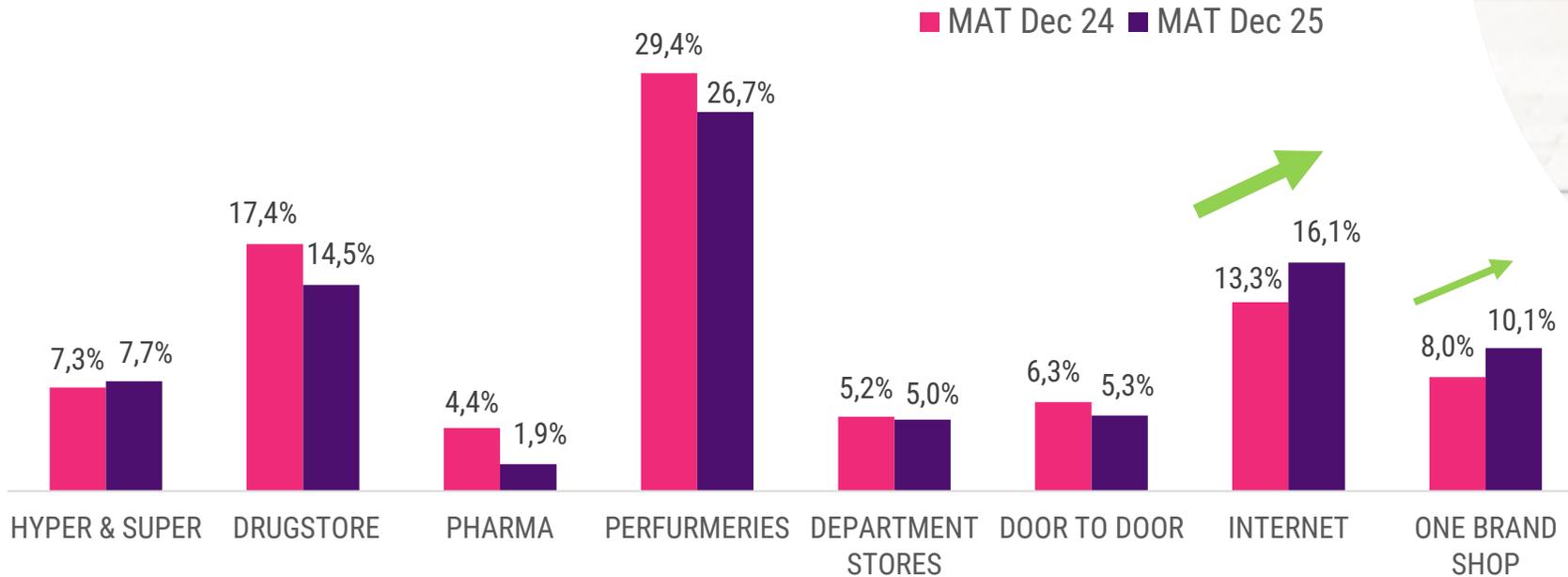
**Body Sprays  
&  
Hair Spray  
&  
Mini size**



**Arabic  
Market**

# Physical Perfumeries are the leading channel, but very important growth for internet and one brand shop

Fragrances Penetration %



Channels overlapping in a year  
**1.8**

# Fragrances all main consumer KPIs show positive trends



**30** mio users of Fragrances in 2025

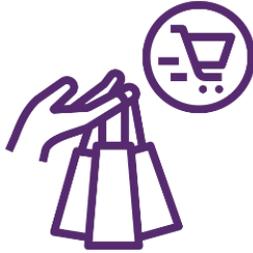


**+3,4%**  
users vs 2024



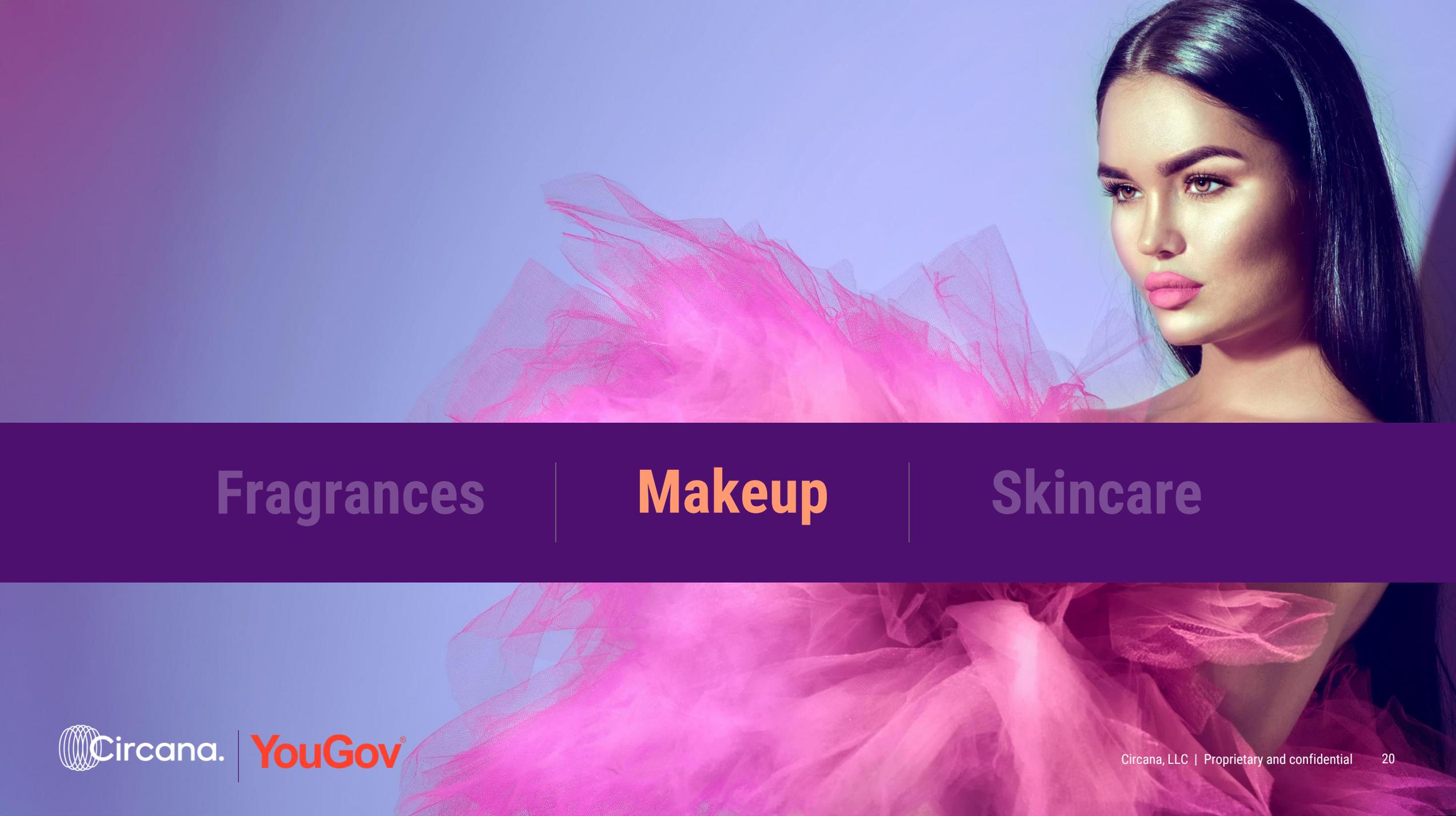
**4,1** packs  
on average in a year

(+5.5%)



**€ 151**  
average spend in a year

(-0.2%)



Fragrances

**Makeup**

Skincare

# Makeup grows +2%, led by Prestige channel

## Complete Beauty

+2.0% in value



Circana **Prestige**

585 M€



Circana **Grocery**

395 M€

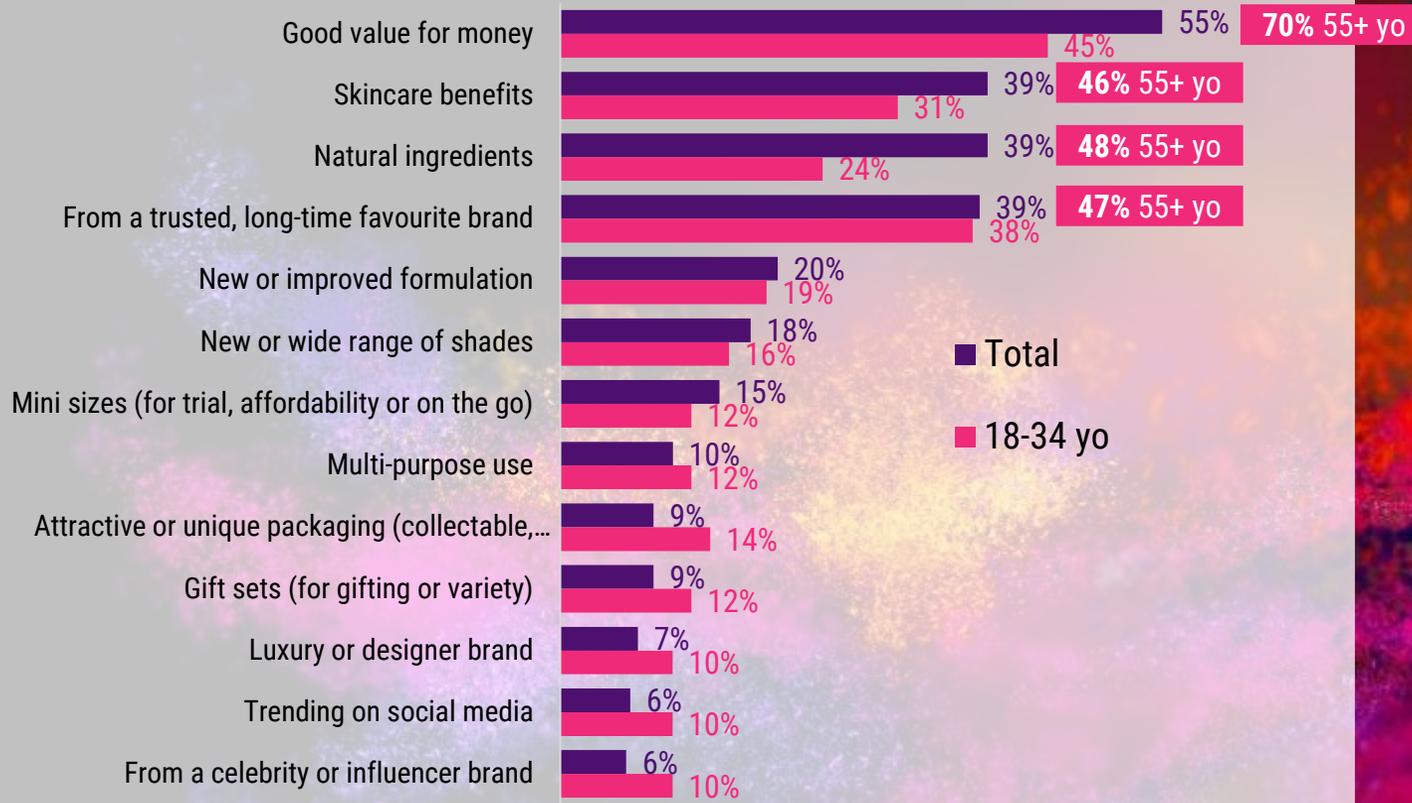


New Line **Pharma**

131 M€

# Good Value for Money and Skincare Benefits shape Makeup choices

## Top factors Influencing Makeup purchases – Only Women



# Makeup Focus Themes 2025

## Social Viral Trend



**Exclusivities &  
Private Labels**

**Italian  
Brands**

**“Professional” &  
“Skinnification”**

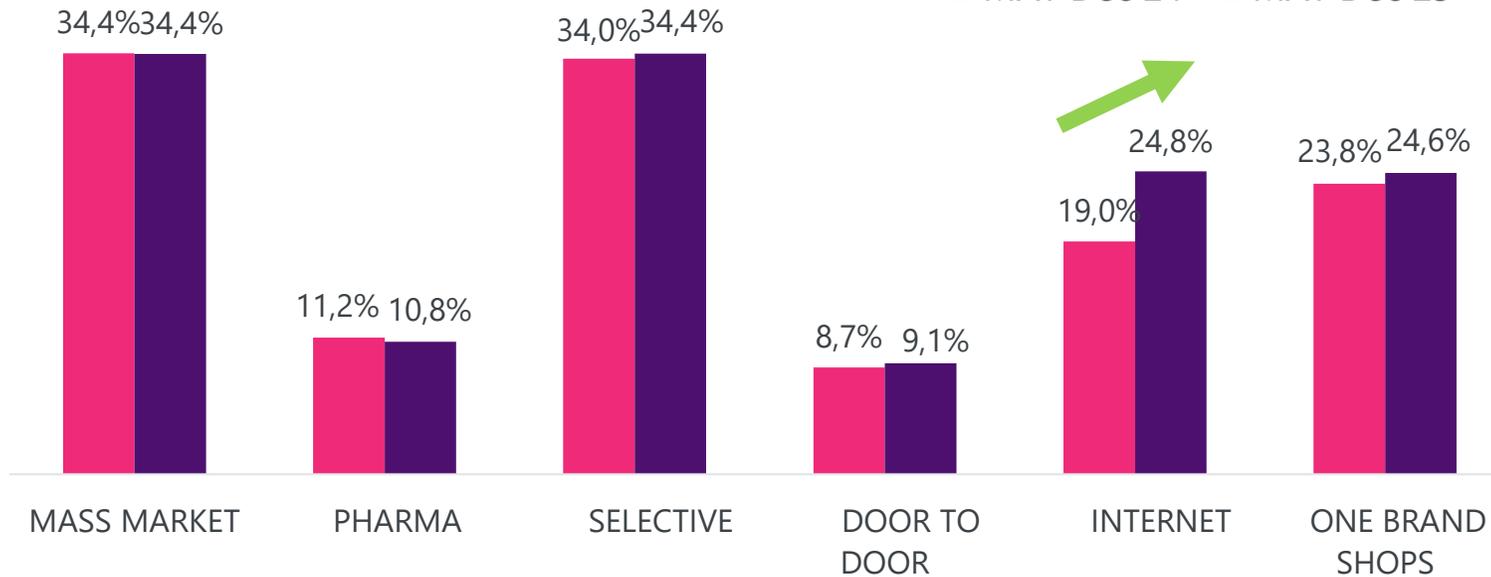
**Collectable/  
Gifting /  
Mini**

# Multichannel purchasing behavior is high in Make up category, with a significant increase in penetration, especially for online channels



### Make up Penetration %

■ MAT Dec 24 ■ MAT Dec 25



# Make Up Consumer KPI



**66%**  
the penetration of  
Italian women  
that have used  
Make Up in 2025



**20**  
mio users

+9,3% vs MAT Jun 24



**8,3**  
avg consumption (packs)

-5,6% vs MAT Jun 24



**82,2**  
Euro per user

-4,4% vs MAT Jun 24

**LIPS** is the most dynamic segments

**+13%**  
users vs 2024

**+14%**  
frequency of purchase



Strongly concentrated in the **15-24** female target



Fragrances

Makeup

Skincare

# Skincare slightly grew across channels

## Complete Beauty\*

+1.4% in value



Circana **Prestige**  
471 M€



Circana **Grocery**  
2.331 M€



New Line **Pharma**  
1.664 M€

# Price and brand trust drive Skincare choices

## Key factors influencing Skincare product choice



Circana Consumer Post Christmas Survey - ITALY - January 2026

Q 17. When purchasing a skincare product, which factors are most important to you?

Base : Italy population (n=527)

# Skincare Focus Themes 2025

Consumers are moving between K-Beauty and derma solutions, balancing innovation, sensoriality, and clinical credibility.



**K-Beauty  
Accelerate**



**Derma  
Leadership in  
E-Commerce**



**Holistic  
Wellness &  
Emerging  
Lifestyle Brands**



**Science-Led  
Innovation  
Momentum**



# K-beauty is driven by young gens: social media hype, quality and skin-expertise are behind this trend

**33%** would choose Korean products because

▲ 49% among 18-34



**48%**  
They are **trendy** /**hyped** on social media

▲ among 18-34



**42%**  
They are **high quality** /**more effective**

▲ among 18-34



**36%**  
They are more **innovative**



**30%**  
They are **skin-expert** /  
suitable for **sensitive skin**

▲ among 18-34



# Total Skin Care – Market overview



## 62% Skin care Care Penetration

on Italian population in 2025



**36,3**

mio users

**+11,7%**

vs MAT DEC 24



**6,8**

avg consumption (packs)

**-6,7 %**

vs MAT DEC 24



**88,3**

€uro per user

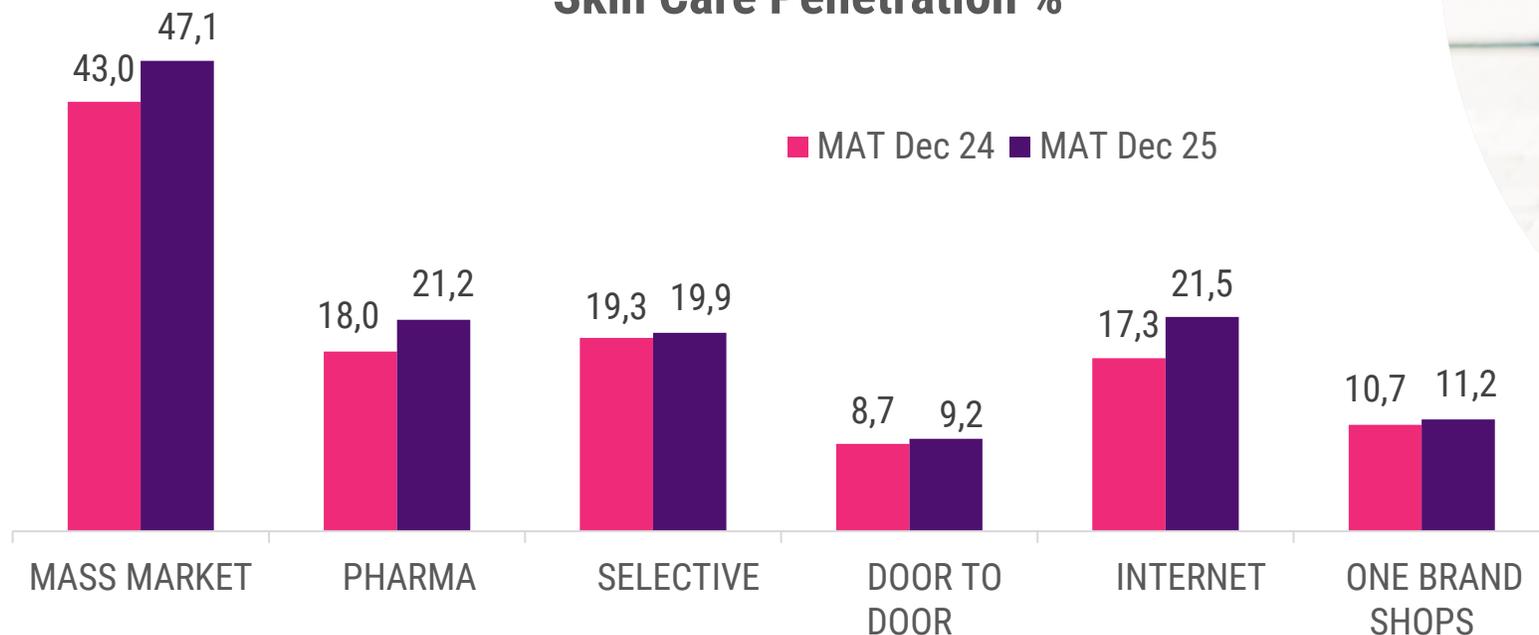
**0,1%**

vs MAT DEC 24

All channels are showing good growth in terms of penetration. Internet became the second largest player in terms of penetration.



### Skin Care Penetration %



# Beauty between extremes: tensions that are modeling the future

In a world of fragmented cultures and lifestyles, **beauty is a mirror of these multiple identities.**

Consumers often have **contradictory desires and shift expectations,** which drive innovation and brand positioning.

Thus, the future of beauty is not defined by clear trends **but by navigating opposing forces**

## Lasting skin health ←...

## ...→ Fast results

Striving for long-term skin health through prevention and regeneration

Driven by the desire to age well and holistic wellness routines



Looking for fast, immediately visible effects without hassle

Beauty as a quick emotional reward and a way to regain control in uncertain times

Barrier repair

Regenerative treatments

Skincare supplements

Bio-hacking

Botox to go

Before/after TikToks

Skin tightening hacks

Cooling tools

# High-tech beauty ←...

# ...→ Natural beauty

Technology promises efficacy, precision and measurable results

Beauty as a science-backed performance system



Nature as a symbol of trust and emotional reassurance

A nostalgic return to simple rituals and ancient recipes

Bio-tech

Derma beauty

LED masks

Clinical aesthetics

AI-driven diagnostics



DIY culture

Botanicals

Minimalism

Quiet beauty

Clean beauty



## Global beauty ←...

## ...→ Local roots

A wish for novelty and exploration

Global aesthetics spreading through social media and cultural exchange



A search for cultural belonging and trust in heritage

Local stories, ingredients and proximity feel meaningful

K-beauty

J-beauty

C-beauty

Viral textures & formats

Regional brands

Local ingredients

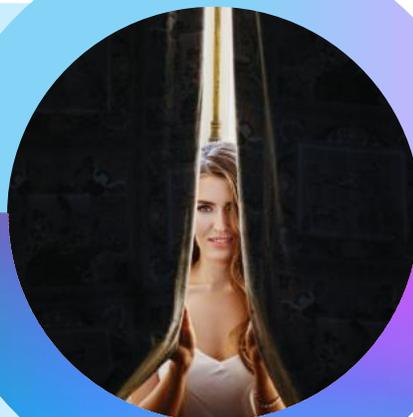
Made in Italy

# Exclusiveness ←

# → Democratization

Prestige, luxury, sensoriality and a touch of hedonism elevate the feeling of premiumness

Expert knowledge as foundation for trust



Price sensitivity meets empowerment

Smart shoppers celebrate access, value and anti-elitist alternatives

High-end serums

Luxury fragrances



Sensorial packaging



Premium experiences

Dupe culture

Creator-led content

Prosumer

Drugstore hauls



How to Start Skin Cycling (And Why You Should)



**Successful brands  
do not necessarily need  
to resolve these  
contradictions but  
orchestrate them  
in a smart way.**

**The future of beauty  
is hybrid, situational  
and identity driven.**

**In a world of  
extremes,  
those who recognize  
the nuances will lead!**

Thank  
you

