



NPD BEAUTY ITALY

Beauty Prestige Update Sept 2020

29 October 2020

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European Beauty Overview

Total Prestige Beauty in Europe YTD Sep 2020

5 Paesi Europei consolidati registrano a fine settembre - 24% sul Total Beauty

YTD September 2020 prestige beauty value market size with value performance



Germany



U.K.



France



Italy



Spain

Value Sales YTD September 2020	1,6B€	1,3B€	1,4B€	0,9B€	0,9B€
%Ch YTD Sep 2020	-16,2%	-30,1%	-23,2%	-26,3	-26,7%

*Prestige Markets : U.K, France, Spain/Prestige + mass brands sold in selective beauty distribution : Germany & Italy – NPD Beauty Trends 2020 including on-line
Conversion rate £1=1,1269€. *Prestige Markets*

A background image featuring a collection of beauty products and flowers. In the upper half, there are several makeup brushes with black handles and light-colored bristles, some lying horizontally and others vertically. A large, light pink flower with many petals is prominent on the right side. The lower half shows more makeup items, including a round black compact, a tube of cream, and two small round containers of powder or cream. The entire scene is set against a light, neutral background and is overlaid with a semi-transparent dark blue band containing the text.

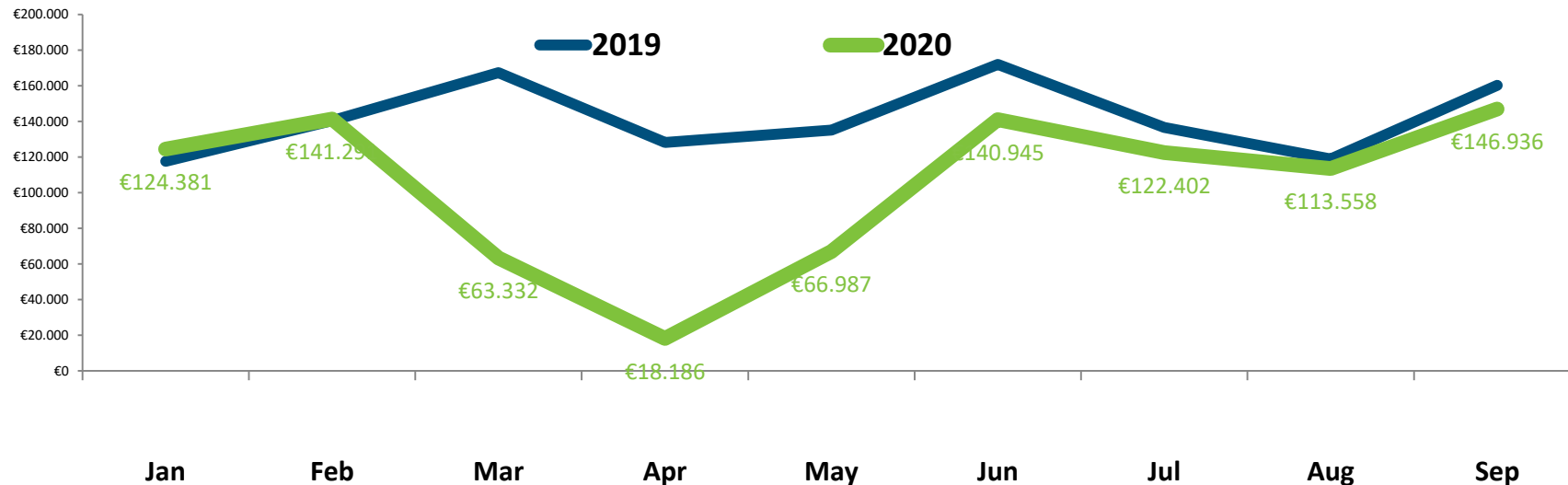
Beauty Italy Focus

Total Beauty – YTD SEP 2020 VS YA

Forte recupero durante I mesi estivi raggiungendo quasi i livelli pre covid.
Overall il mercato a fine settembre registra un calo del -26,5%.

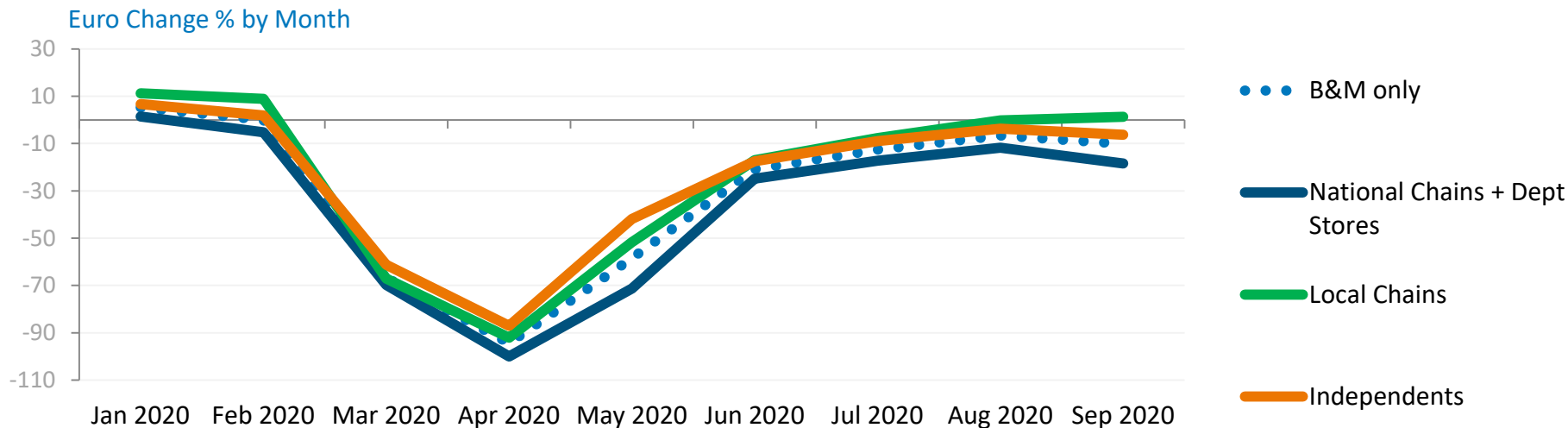
Value Sales Mio€

K euros



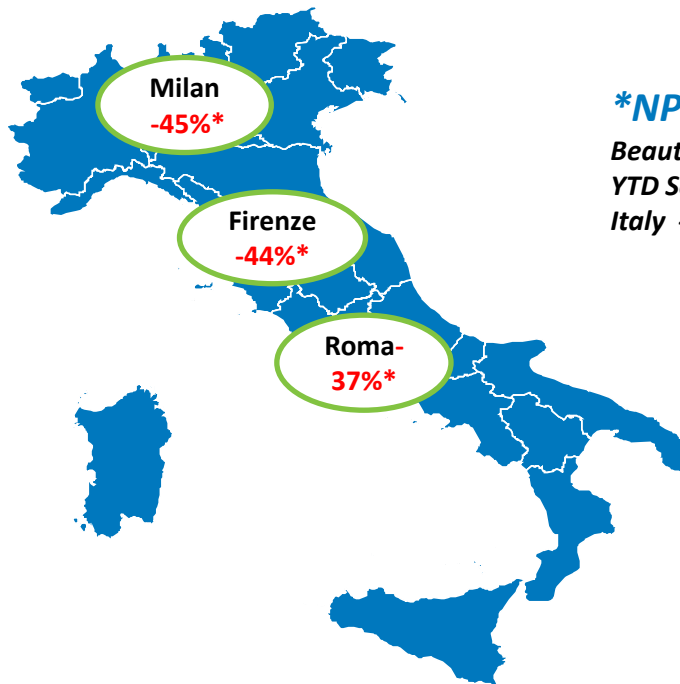
Beauty Monthly trend by Channel split - YTD Sep 20

Le National Chains+GM, oltre al prolungato lockdown, soffrono della loro maggiore presenza in grandi città turistiche, mentre le local chains e indipendenti beneficiano della maggiore prossimità.



2020: The “Black Year for International Tourism”

Il crollo del turismo internazionale e del business travel ha infatti impattato maggiormente sulle grandi città turistiche.



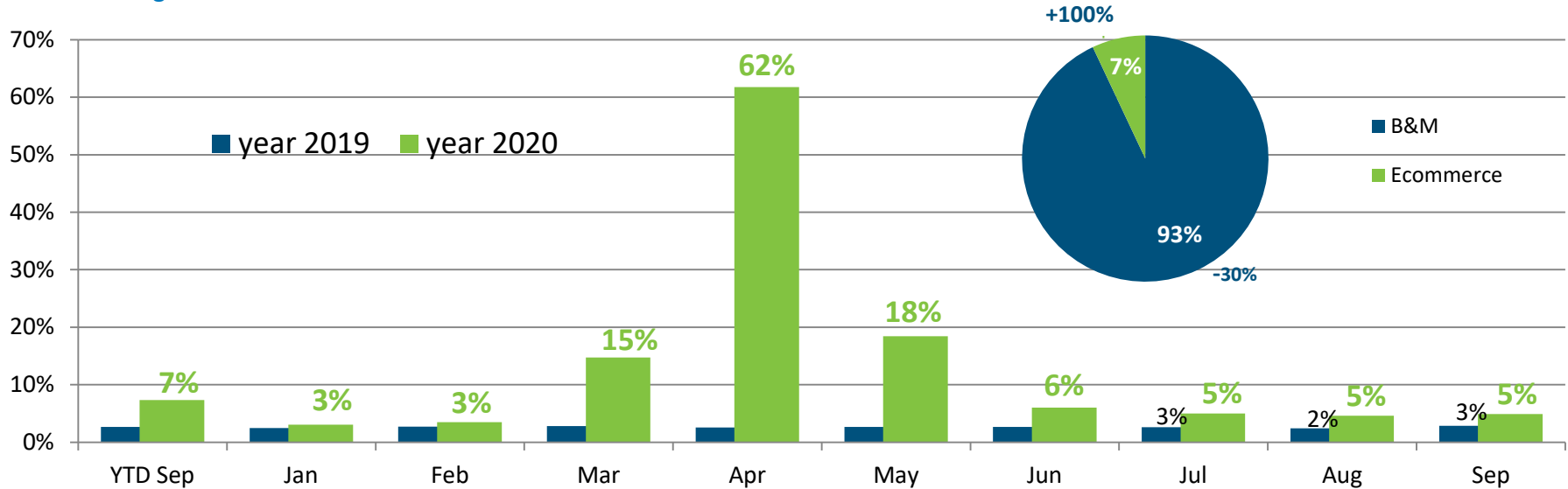
****NPD Top City study:***

*Beauty Euro sales Change
YTD Sep 2020 vs YA (Total
Italy -30%)*

Total Beauty – YTD SEP 2020 VS YA – E-commerce

L'E-commerce è stato un canale fondamentale durante il Lockdown e nella fase della riapertura ha trattenuto nuovi consumatori raddoppiando complessivamente le vendite.

Value € weight



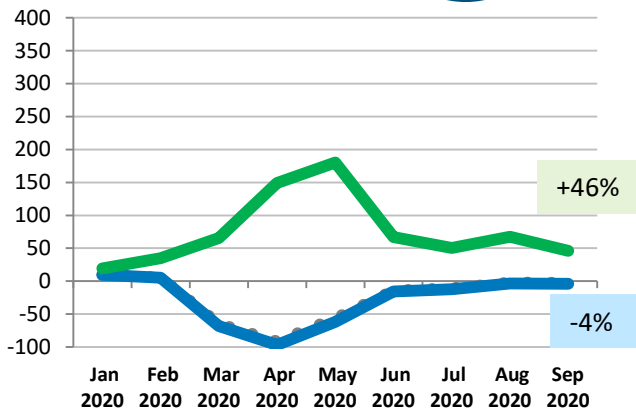
Monthly trend per channel type & per category

Le Fragranze recuperano bene nel B&M, mentre lo Skincare mostra le migliore performance nell'e-commerce

% Euro change in value 2020 vs 2019:

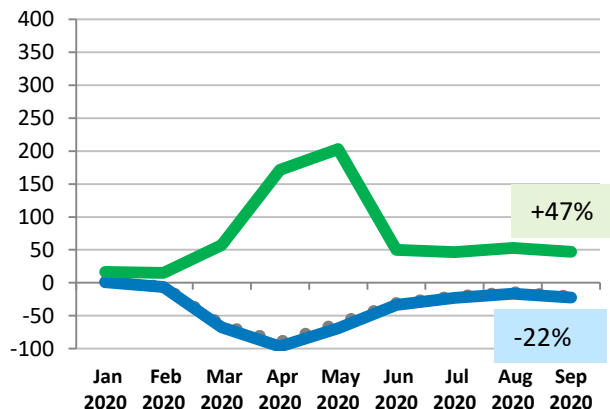
FRAGRANCES

-24%



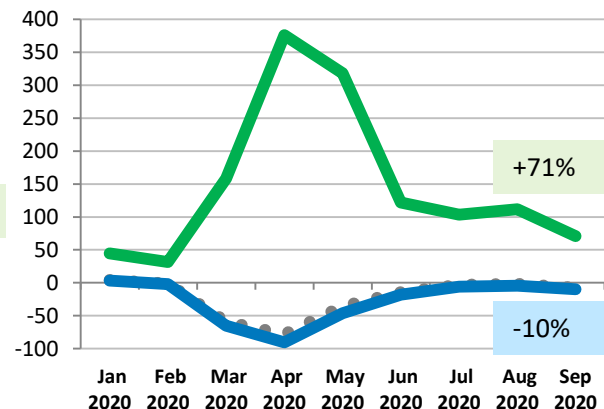
MAKEUP

-36%



SKINCARE

-23%



• • • FRAG. — B&M — ECM

• • • MAKEUP — B&M — ECM

• • • SKINCARE — B&M — ECM

What Consumers are looking for?



HEDONISTIC EXPERIENCE

Fragrances of happiness or body creams with an enveloping texture



HANDS PROTECTION

Repairing hand products and creams will become a solid segment



NEW CLEAN BEAUTY

The "in control" attitude the main focus of the beauty in 21, the priority is protect us, consumer want maximum transparency regarding the type and provenance of the Ingredient and formula



GREEN BOOM

more and more attention to green formulas



FOCUS ON EYE

Mascara will increasingly be a must have (colored, waterproof, volume effect, all-in one) and Eyebrow products



WATCH OUT OF THE EYE CONTOUR

anti-fatigue eye products to face stress and excesses of digital life



LIPSTICK NO TRANSFER

Lipcolor with a long-lasting formula able to moisturize the lips

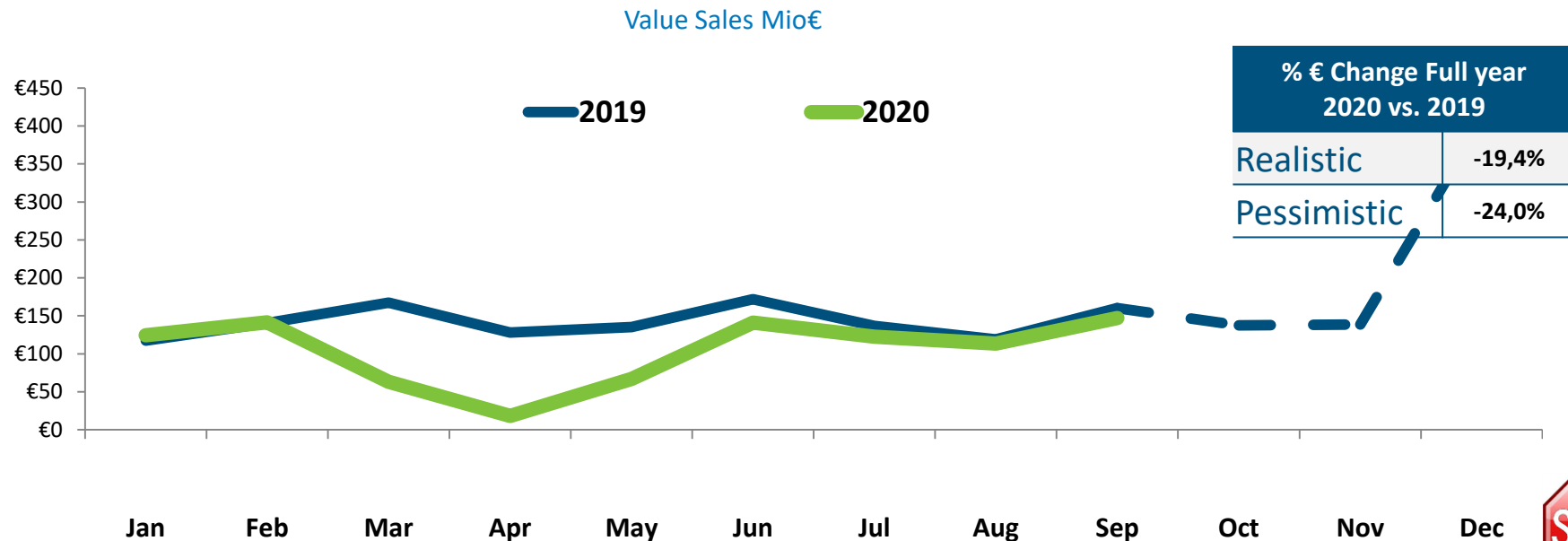


LONG-LAST FOUNDATION

No transfer, capable of withstanding several hours, or foundation with a water-based formula and natural effect

Quale landing 2020?

Quale landing, sapendo che il Q4 rappresenta il 35% delle vendite annue?



26 October NEW DCPM

Bar, restaurant closed at 18; cinema, theatre, swimming pool, gyms closed; DAD (remote learning) for high school....

THANK YOU

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