

Italy NPD BeautyTrends

YTD June 2021

28 giugno 2021

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In Italia, osserviamo un rimbalzo del +30% vs il 2020. Maggio e Giugno si avvicinano ai livelli precovid (-8% e -4% vs '19)

Weekly Sales % Change - Jan-June 2021

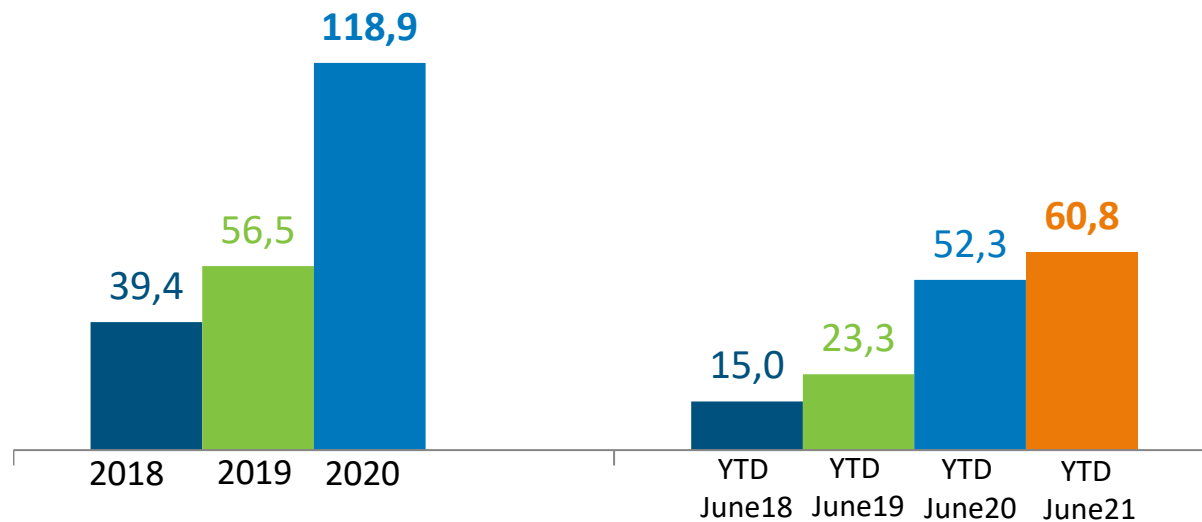


	January	February	March	April	May	June	1sem21
€ chg vs YA	-22%	-10%	+178%	+326%	+47%	+12%	+30%
€ chg vs 2YA	-19%	-15%	-29%	-25%	-8%	-4%	-16%

E-commerce Acceleration

L'on-line, dopo il raddoppio del 2020, prosegue la sua crescita nel 2021 seppur ad un ritmo più rallentato (+16%), grazie alle minori restrizioni che spingono la ripresa del B&M.

On-line Euro M€ Sales



Euro Weight	2,1%	2,9%	7,9%	1,8%	2,7%	9,4%	8,4%
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Il Makeup perde ancora 1/3 delle sue vendite rispetto al 2019, mentre lo Skincare e le Fragranze stanno recuperando più velocemente il gap vs il periodo pre-covid

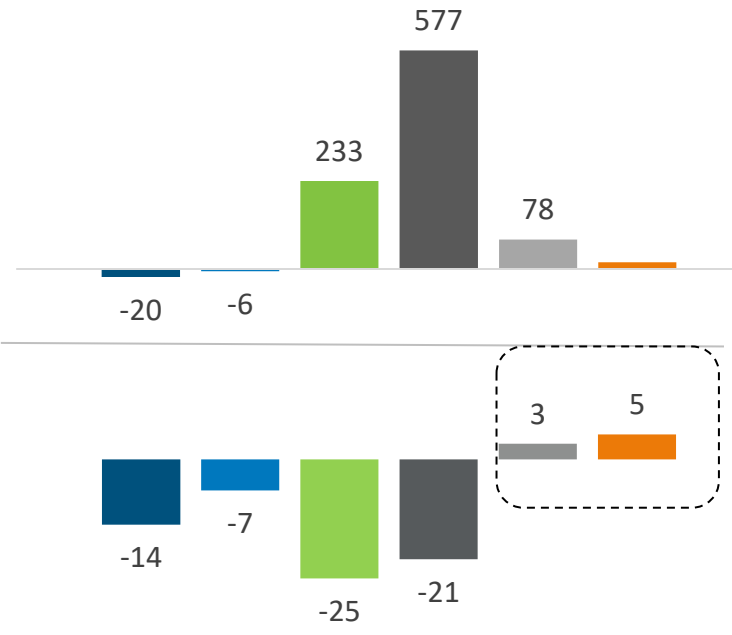


Euro Chg '21 vs '20

Euro Chg '21 vs '19

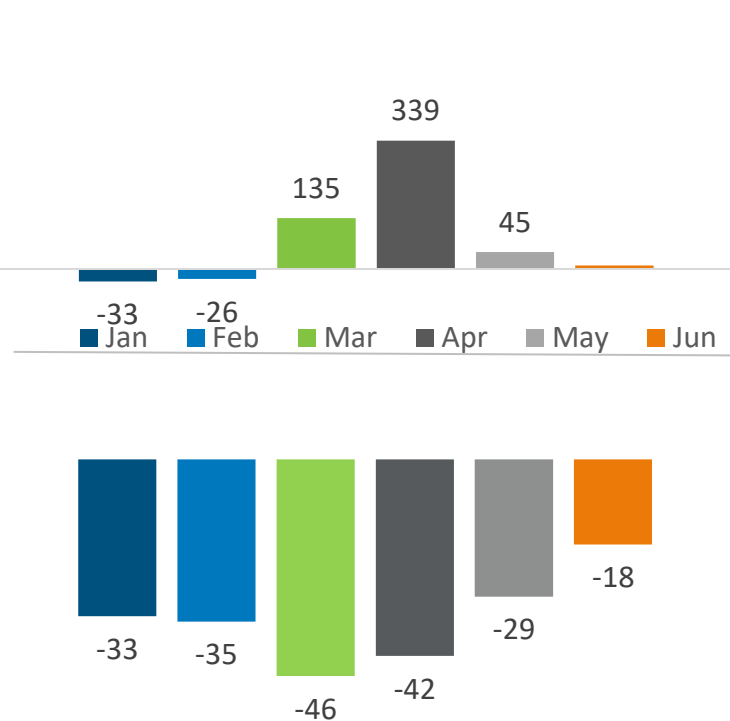
Accelerated Recovery + 41%
-9,4% vs 2019

Fragrances



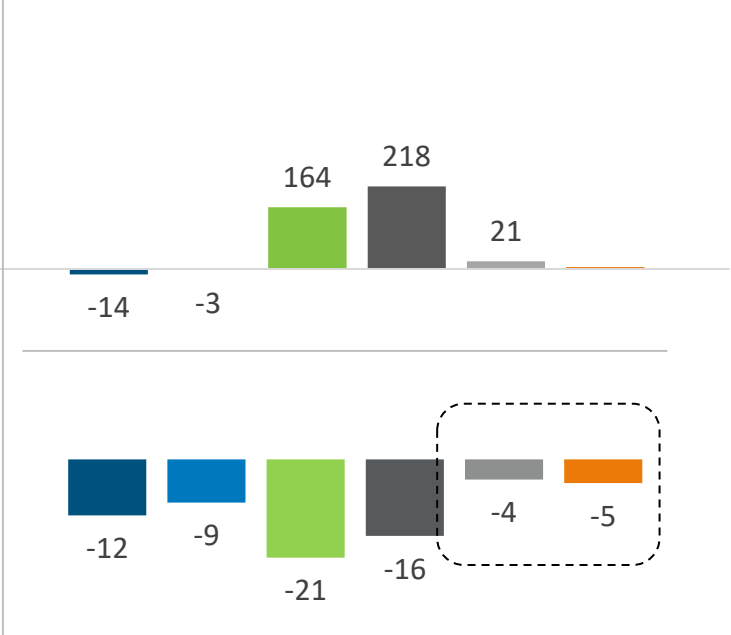
Ongoing Decline +16,3%
-34,3% vs 2019

Makeup



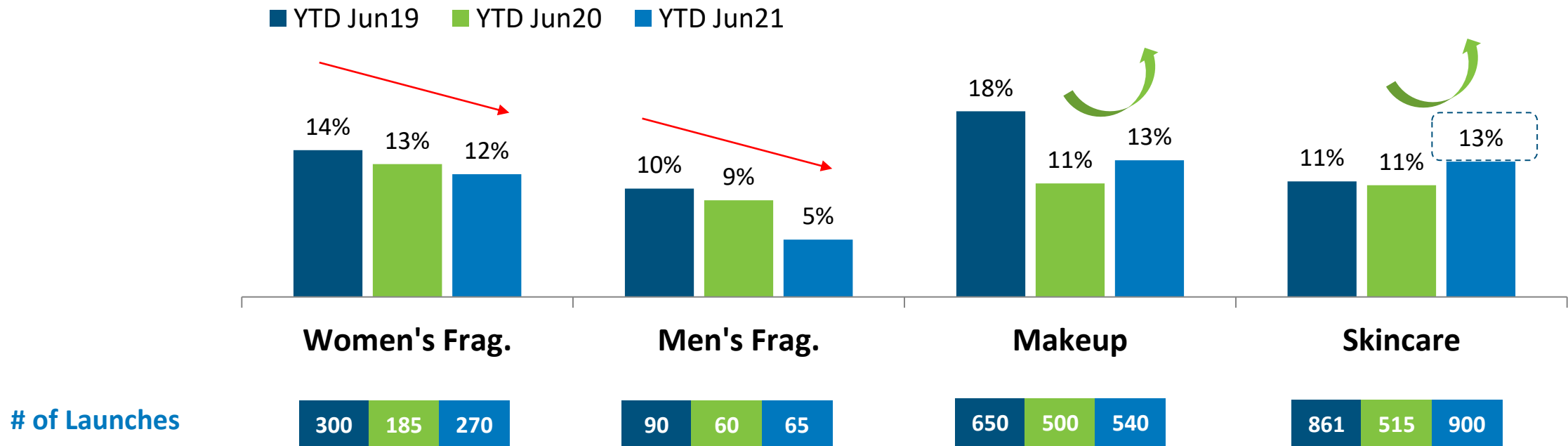
Confirmed resilience +27,6%
-11,1% vs 2019

Skincare



L'innovazione nelle fragranze è ancora debole, i lanci Make up in recupero seppur ancora sotto i livelli pre-covid, mentre lo skincare evidenzia un boom di innovazione, superando i livelli del 2019

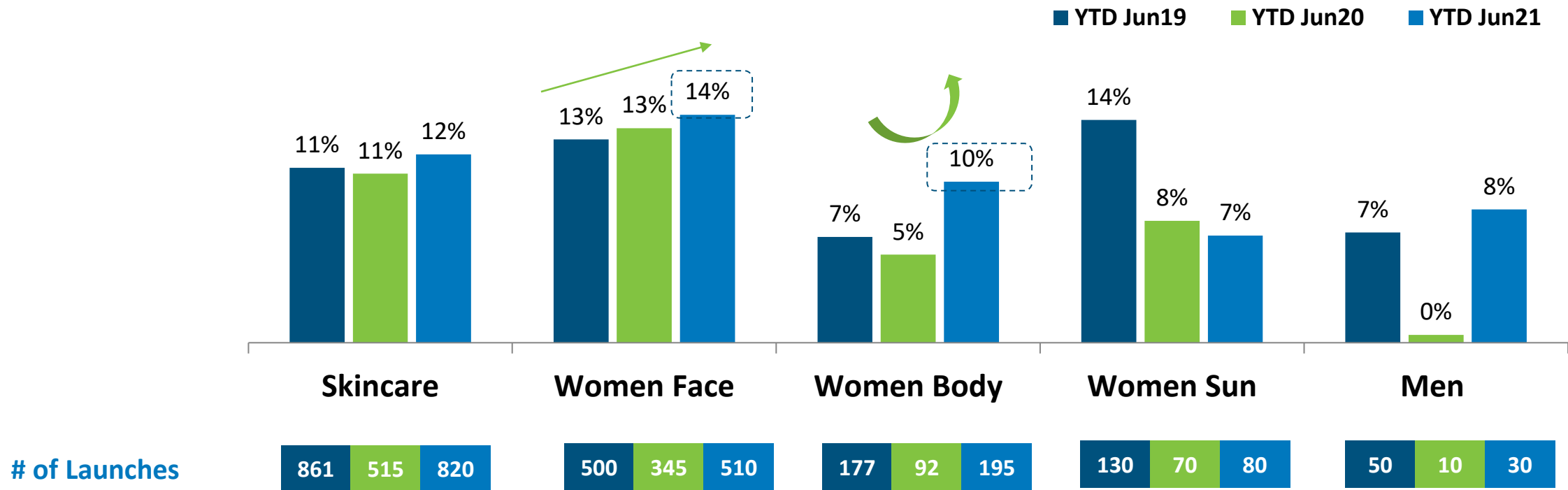
€ weight of launches



Lines launched in the last 12 months (Jul-Jun) – Value YTD Jun21

Nello Skincare, forte ripresa dell'innovazione nel Corpo (Boom delle Bende) oltre allo skincare viso (Boom dei sieri)

€ weight of launches



Body Fitness e Body Rituals booming, per recuperare fisicamente e psicologicamente dallo stop forzato di questi mesi di pandemia

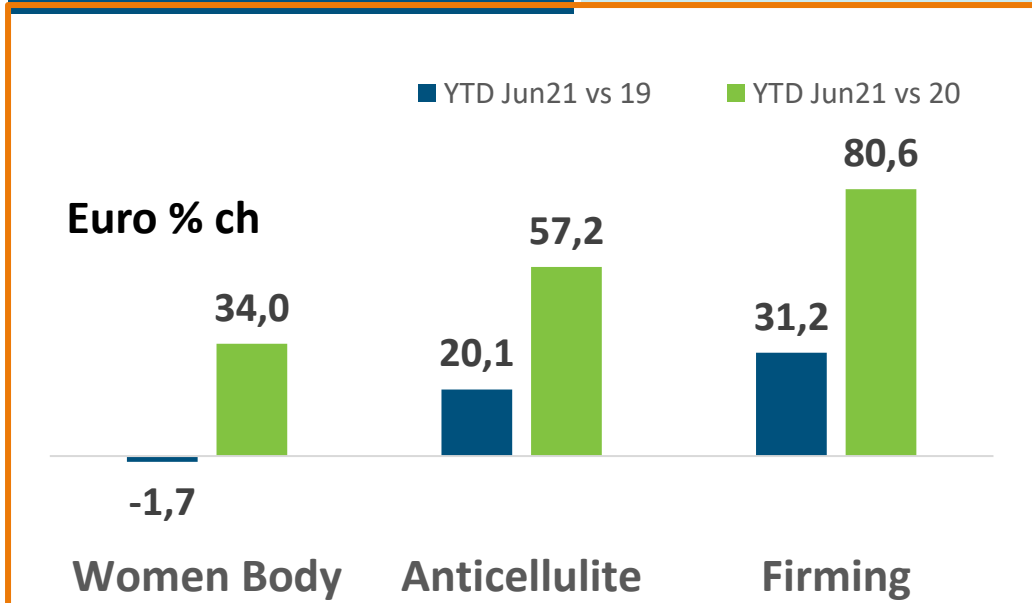
Google Trends:

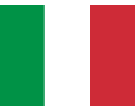
«rimedi efficaci contro la cellulite» registra + 3250%, «trattamenti shock cellulite shock " + 400%, «corsa e cellulite" + 250%



Più sportive:

maggiore attività outdoor e crescita del «*mai più senza yoga e fitness*», grazie al boom dei corsi online. 44 % delle intervistate cercano di stare in armonia con corpo e mente



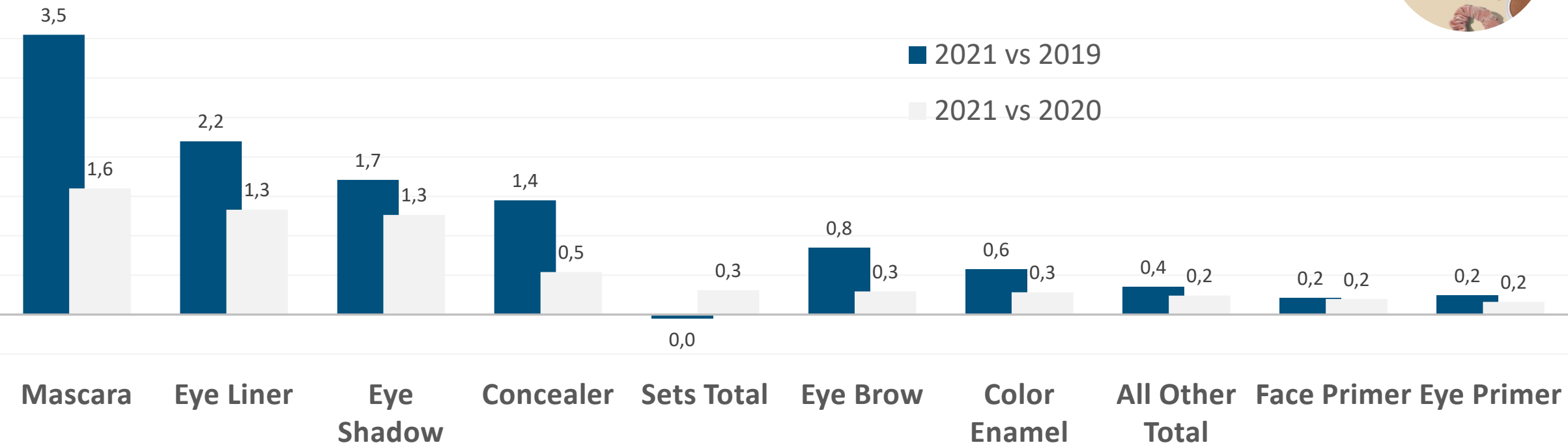


Nel make up, continua il focus Occhi (specialmente Mascara), il ritorno allo smalto e la crescita dei primers

MAKE UP



Euro Weight Gap – YTD June 2021 vs YA and 2YA



Value Weight YTD Jun2021

Mascara	13,0%	Eye Liner	9,2%	Eye Shadow	6,7%	Concealer	6,6%	Sets Total	4,5%	Eye Brow	3,2%	Color Enamel	3,0%	All Other Total	1,8%	Face Primer	1,5%	Eye Primer	0,6%
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Skinification & Hybridation

If Generation Z is demanding a more multitasking beauty routine, the beauty world is responding

A real cross-contamination between skincare and make-up in which "formulas are similar to serums and face creams, in a continuous hybridization" according to Mintel



Marionnaud website:
A section to discover the new trend of skinification

Usage of multifunctional products: more than the simple makeup but product with beneficial properties for our skin thanks to skincare ingredients



Clinique Even Better Clinical Serum Foundation



Milk Makeup Glow Oil Lip & Cheek



Charlotte Tilbury Hyaluronic Happikiss



Pixi H2O Skintint



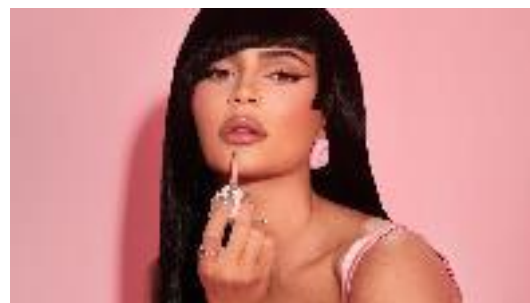
Glow Recipe Watermelon Glow Niacinamide Dew Drops

Nuove Make-up brands nel Beauty Prestige: exclusive, inclusive, sustainable and green



Human Beauty by Valentino

From 31 May in Selfridges and from August worldwid but with a niche distribution: **exclusive and inclusive**
«Couture Makeup begins with you»



Kylie Cosmetics launch

New formulas, cleaner and strictly vegan, a new packaging.

New shopping experience : physical retailers (Douglas in Europe) but a DTC website will be launched that will give access to the line of cosmetics and skincare.



Rare Beauty by S.Gomez

Launched on 1st July in Europe as Exclusivity in Sephora
It's inclusive and enhances uniqueness



New Designer Capsule

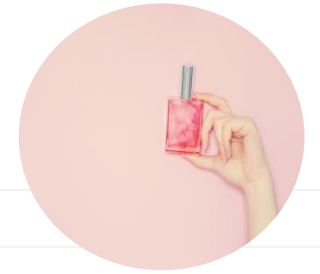
Byredo first collection in LR Milano and Roma from 1st July: **Genderless, multipurpose, natural, vegan**

First 6 palette (blush and Eye) of Christian Louboutin in LR Milano and Roma from June

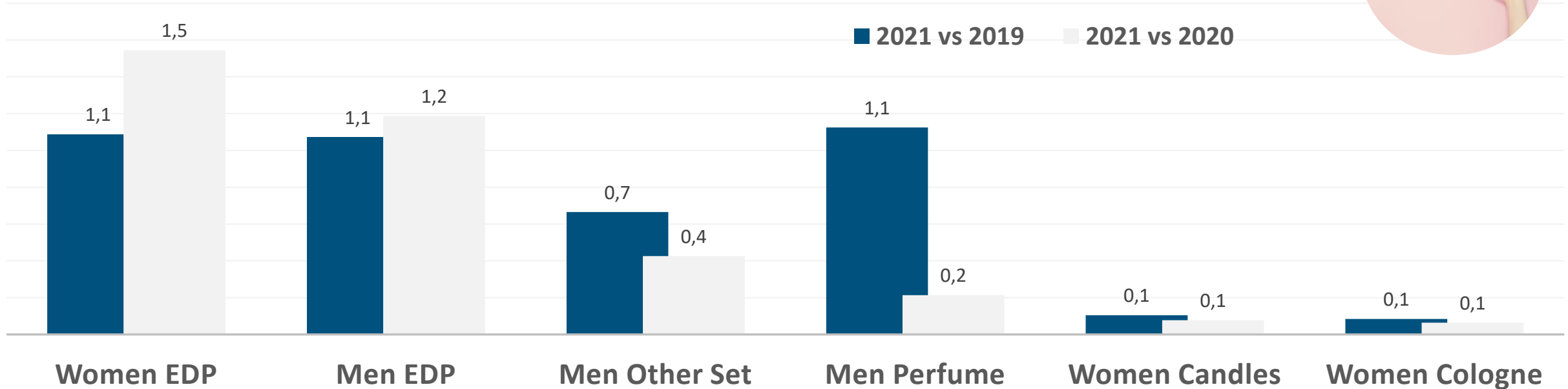
Nelle fragranze le alte concentrazioni e l'«home ritual» (candele e diffusori) sono i segmenti vincenti



FRAGRANZE



Euro Weight Gap – YTD June 2021 vs YA and 2YA



Value Weight YTD Jun2021

39,2%

9,5%

1,2%

1,9%

0,2%

0,8%

Si allarga anche l'offerta delle Fragrance Collections, con nuovi concetti e estensioni di quelle esistenti



Ferragamo Storie di Seta



Les Rivieres de Cartier



Miu Miu Les Eaux a la mode



Bulgari Allegra



Jo Malone London Marmalade



LV Les Extrait Coll



Eden-Roc in
Maison Dior



Paris-Edinbourg in
Les Eaux de Chanel



1921 in The
Alchemist's
Garden

What to watch in 2021



SUSTAINABILITY



HEALTHIFICATION



SKINFICATION & HYBRID



SKIN MINIMALISM



PREMIUMIZATION



MIXOLOGY



INCLUSIVITY



INFLUENCER & TIK TOK

THANK YOU

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