



THE ITALIAN BEAUTY INDUSTRY: SCENARIO, MARKET AND TRENDS

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SAY HELLO TO OUR IDENTITY



This is
BELLEZZA

Italian Beauty is an ecosystem that brings together **science**, **technology** and **creativity**

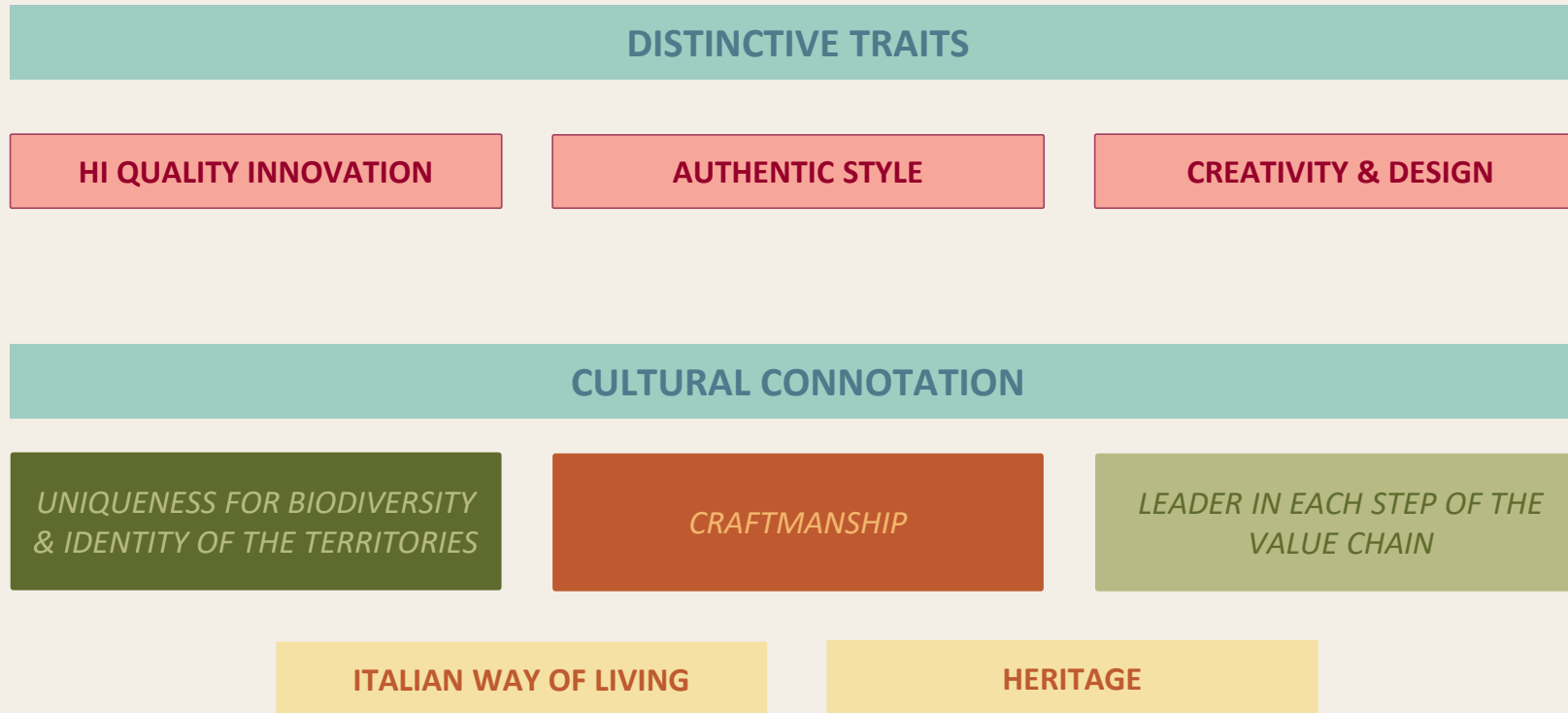
It grows from a unique **way of living** rooted in culture, human relationships and **everyday pleasure**.

It is where **passion**, craftsmanship and design become **innovation**

THIS IS OUR WAY.



SAY HELLO TO OUR VALUE PROPOSITION



SAY HELLO TO OUR IDENTITY

DISTINCTIVE TRAITS:

Italian lifestyle

A unique balance between beauty, human connection, everyday pleasure, and territorial identity, expressing an authentic and engaging way of living.

Creativity and design

The meeting point between artisanal tradition and technical solutions has enabled places like Bormioli to create iconic bottles, turning packaging into a distinctive design element.

High quality

Scientific rigor, research, and investment in innovation make Italy a leading manufacturing hub, chosen by major international brands.

CULTURAL ASPECTS:

Biodiversity and territory

A beauty expressed through local excellence, from bergamot and lemon to iris, alpine starflower, olive, and aloe.

Cultural heritage

The universal value of Italian beauty is recognised worldwide through elements such as art, music, design, landscape, and cuisine.

Leader in the value chain

A beauty that emerges from a virtuous "cosmetic valley," driven by high technological standards, research, and product development always oriented toward the future.

Craftsmanship

A beauty shaped by artisanal mastery and "custom-made" techniques. Flexibility in quantities, quality, production types, and packaging that enhances the entire supply chain.

from € **18** bn of
cosmetics industry
turnover to € **49** bn of the entire
value chain

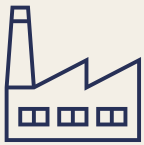
SAY HELLO TO OUR INDUSTRY

AN INDUSTRY THAT CREATES VALUE,
OPPORTUNITIES, AND EMPLOYMENT.

The cosmetics industry supports the real economy and local communities. With a total turnover of €18 billion, our value chain, spanning raw materials, formulation, packaging, and distribution, generated €49 billion, along with €31.5 billion in added value (equal to 1.4% of Italy's GDP).

In Italy, more than 63,000 people are directly employed in the sector, which offers a wide range of career paths, from formulators to packaging experts, from technologists and chemists to product managers and beauty advisors. The cosmetics industry is a **system that grows through people** and, through skills and expertise, **multiplies professional opportunities** across the entire value chain, generating a total of around 500,000 jobs, equal to 1.6% of the national workforce.

GLOBAL VALUE CHAINS AND RESHAPING FOR THE ITALIAN BEAUTY



€ **18.0 bn** +**2.9%**
total turnover 2025 '25 vs '24

domestic market export
€ **9.4 bn** € **8.6 bn**
(+**1.8%**) (+**4.1%**)

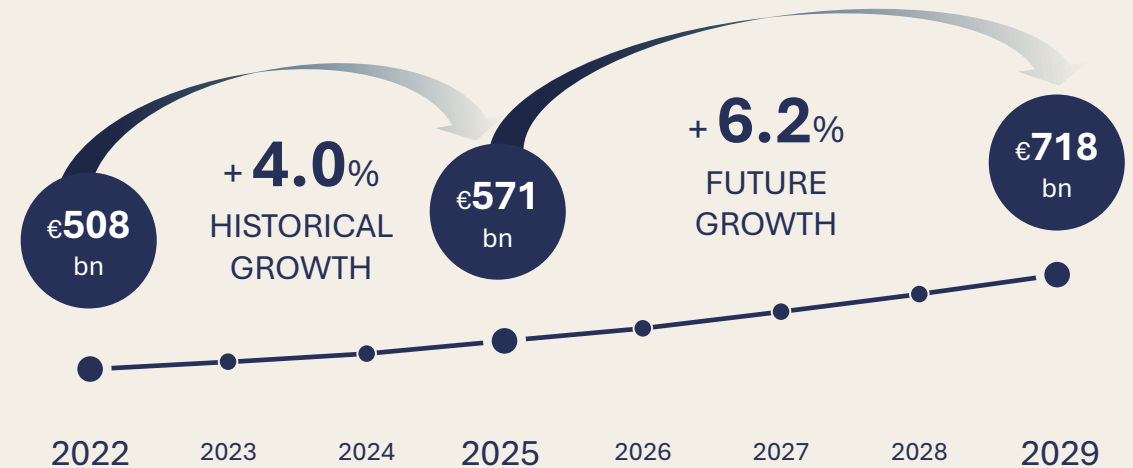
export share of total
turnover is **48%**

Revenue Acceleration: The industry outlook demonstrates resilient performance, with total turnover projected to grow **in 2026** by +4.0% amid a landscape of cautious optimism.

International Outperformance: A robust +5.0% forecasted **in 2026** surge in exports is fundamentally rebalancing the sector's growth dynamics and global market exposure.

EVOLUTION OF WORLDWIDE BEAUTY CONSUMPTION

Forecasts to 2029 indicate a **pace above** the **historical trend**, and **macroeconomic indicators** an acceleration but with **significant differences** across regions, categories, and price segments.



TOP COUNTRIES BY BEAUTY CONSUMPTION

Italy ranks as the **3rd largest** consumer market **in Europe** and **10th worldwide**, recording an average growth rate of **6.5%** over the last three years, against a global trend of **+4%**.



BEAUTY EXPORT AND WORLDWIDE RANKING

Share of global
exports*

1st France

16.6%

2nd US

8.3%

3rd Germany

7.0%

4th South Korea

7.0%

5th Italy

5.6%

France ranks **1st** (fragrances and skincare); South Korea ranks 4th overall, but **2nd** in skincare alone (75% of its beauty exports).



1st place

for hair dyes and preparations, followed by the US and Germany.

3rd place

with fragrances, following France and Spain.

Italy ranks **5th** in beauty exports, but almost **half of the value** is held by the **top three** major global beauty exporters.

ITALIAN BEAUTY EXPORTS IN DETAIL



top 10 countries	value 2025	'25 vs '24
US	€ 1,174 mn	+ 1.3%
France	€ 873 mn	- 0.7%
Germany	€ 783 mn	+ 1.8%
Spain	€ 645 mn	+ 15.3%
UK	€ 412 mn	+ 2.6%
Poland	€ 390 mn	+ 14.9%
The Netherlands	€ 334 mn	+ 10.5%
UAE	€ 305 mn	- 2.0%
Russia	€ 281 mn	- 13.4%
Hong Kong	€ 208 mn	- 17.0%

categories	value 2025	'25 vs '24
fragrances	€ 2,733 mn	+ 6.4%
skin care	€ 2,184 mn	+ 2.3%
hair care	€ 1,577 mn	+ 3.0%
make-up	€ 1,256 mn	+ 1.8%
personal care	€ 824 mn	+ 6.9%



THANK YOU!

Milan, 23 July 2026