THE COSMETICS INDUSTRY: PRODUCTION, THE MARKET AND FOREIGN TRADE

The trend of the cosmetics market in Italy is still basically in line with that of the past few years, exceeding 9,500 million euros in 2013, showing just a slight reduction of 1.2 percentage points. Although it hasn't seriously affected this sector, the continuing recession undoubtedly means the need to transform those channels where indirect cosmetics consumption is more highly conditioned by the tendency to buy: this is the case of the professional channels (beauty and hairdressing), that are witnessing sharper reductions.

Already on previous occasions, the anti-cyclical nature of this sector was highlighted, with a certain rationalisation in consumers' choices. There has been a shift, in the last few years in particular, towards the less expensive price ranges and channels, but without renouncing the premium products; this has meant a decrease for the intermediate price band. The most obvious result is that the quantity of consumption is not falling; on the contrary, certain items are showing a positive trend, confirming that the cosmetics field is not suffering the effects of the recession and can be considered a "physiological" consumer good immune to any negative situations. The modification of the distribution scenario is more significant. It began some years ago, with the development of specialised mass market, the emergence of new, single-brand channels, and the renewed dynamics of direct sales. In addition, we shouldn't forget that some traditional channels - like herbalist shops - are becoming more difficult to single out as they are linked more to the product concept than the type of distribution.

As a result of these facts, the turnover of Italian companies (i.e. the value of their production) is conditioned only marginally by the slow trend of the domestic market: in 2013 it reached 9,300 million euros, with a growth rate of 2.6%, generated primarily by sales on foreign markets that are approaching 3,200 million euros with an increase of 11 percentage points.

Constant investment in innovation and development allows the Italian companies to compete in an increasingly efficient manner on the international markets, where there has been a notable growth in the quantity of sales too - a sign of a competitive and reliable offer.

ITALIAN COSMETICS MARKET

-1.2%
2013/12 change

INDUSTRIAL MANUFACTURE OF COSMETICS IN 2013

9,300
million euro

EXPORTS OF COSMETICS

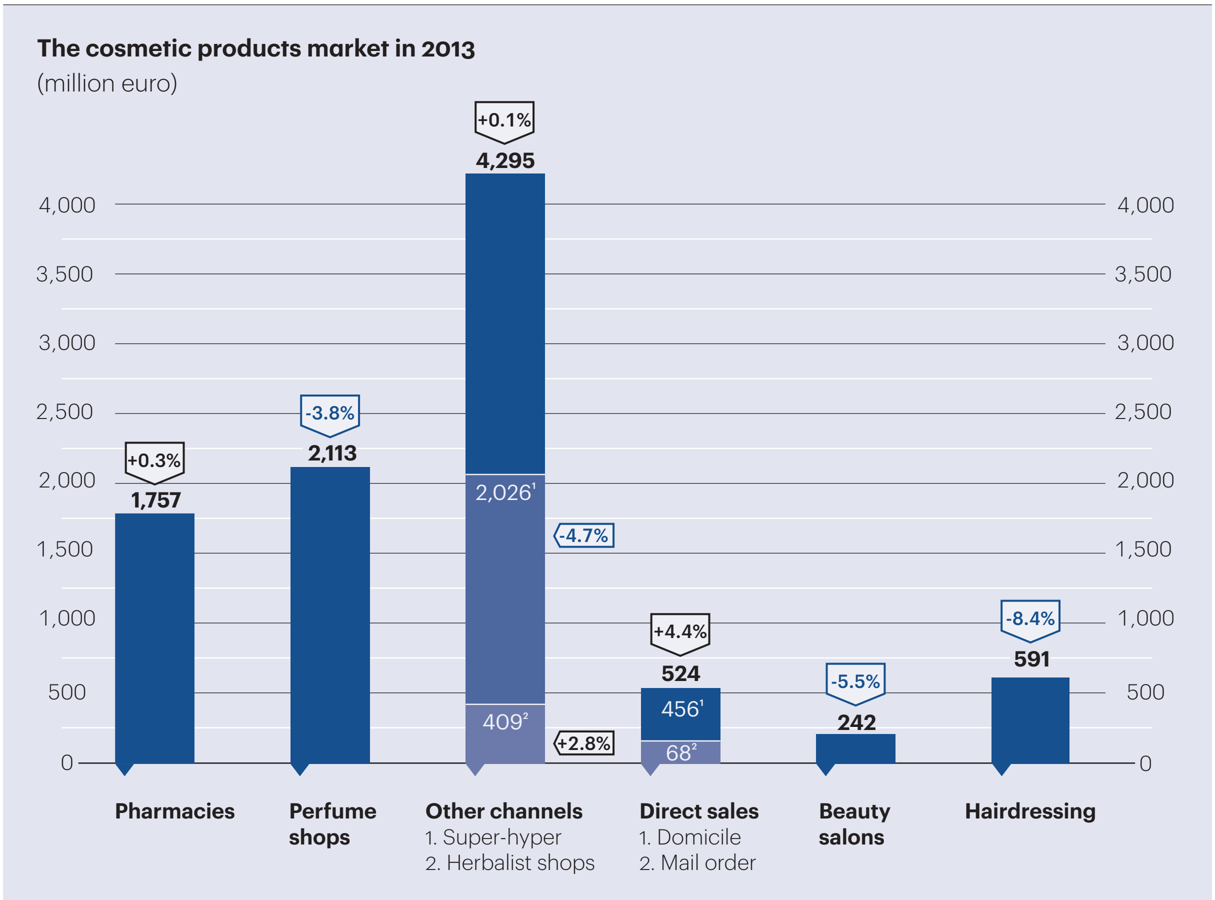
+11.0%
2013/12 change

TRENDS OF CHANNELS IN 2013

+4.5% Domicile

-8.4% Hairdressing

THE MARKET: CHANNELS



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From 2007 (when the current international recession began) to today, the sale of cosmetics in Italy has undergone a fairly limited reduction, remaining a constant feature of consumers' purchasing options. The negative situation of recent years has certainly had an effect on purchases in terms of volume, but not in terms of quantity: in 2013, consumption exceeded 9,500 million euros, with a drop of little more than one percentage point.

The **pharmacy channel** figures show a plus sign for the end of 2013, after a period of slight decline (conditioned more by the reduction in the value of purchases than the quantity). The market exceeds 1,750 million euros - equal to 18.4% of the total sales of all cosmetics on the national market. Once again, the consumer loyalty factor emerges, with customers appreciating the higher level of specialisation and service offered by the pharmacies in relation to other distribution channels. Pharmacies have invested more in the cosmetic product and the specialisation of sales personnel, but there are still notable opportunities for extending the clientèle, especially in the over-50 age band. The phenomenon of the para-pharmacies seems to have died down with the recent economic policy regulations.

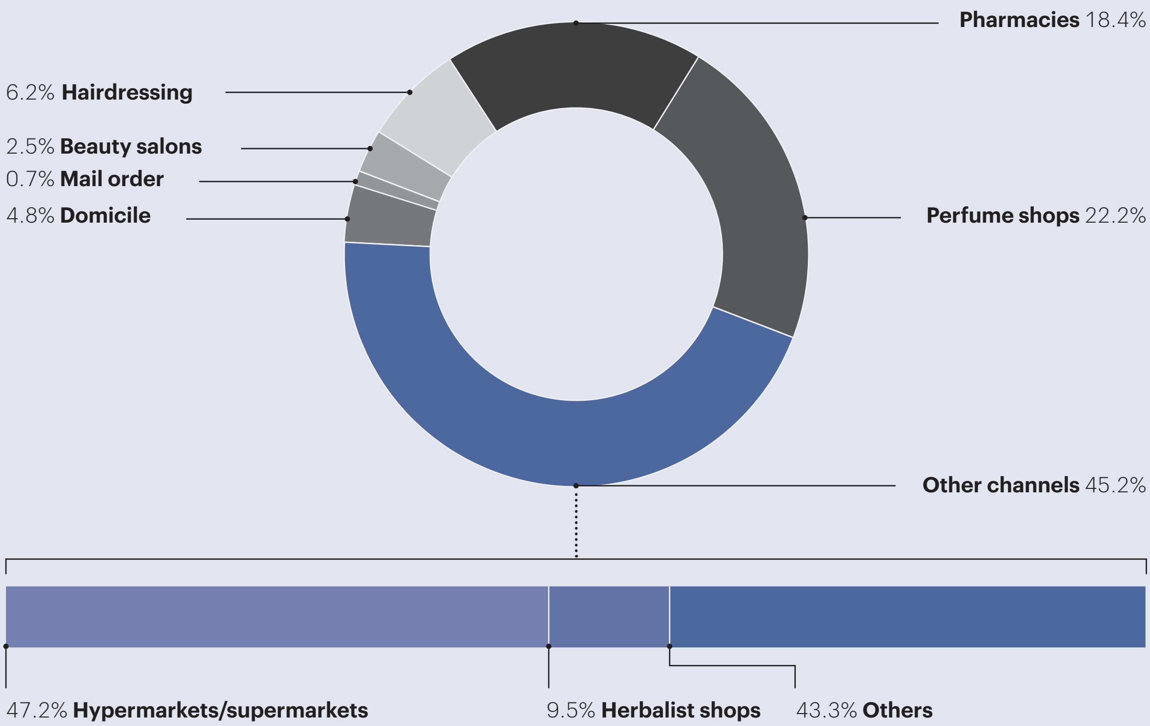
Again in 2013, cosmetics sold in **herbalist shops** confirmed the positive trend of recent years, albeit at a slower pace; the value of the sales (close on 410 million euros, with a growth of just under three percentage points) confirms the strength of this channel though, covering 4.3% of total Italian consumption. In the future, the type of purchase will be revalued, as certain players act outside the classic concept of the herbalist shop despite displaying the same attention to the health and naturalistic features of the products sold.

The consumption trend in **perfume shops** continues to show a streamlining of the channel and the transformation of selective distribution again in 2013: the deep-rooted tension in some types of retail outlet conditions consumption, which has fallen by almost four percentage points; the sales value is 2,113 million euros - 22.2% of total consumption in Italy. In some cases there is a continuation of policies aimed at sustaining the volumes with price increases, with clear effects on purchases and a drop in consumers. This channel is going through a period of profound change, with consumer groups split between loyal and occasional customers, hence new measures are needed to support the channel's selectivity. Despite support actions like new launches, stock reduction and dynamic price list policies, many independent retail outlets are still in difficulty.

Mass market sales which, it should be remembered, cover more than 40% of the national cosmetics market, show no great changes, with a value approaching 3,900 million euros in 2013. If the values of the herbalist shops are included for comparison purposes, this figure rises to 4,300 million euros. Those working in this channel applied significant investments to the ranges during 2013, and also attempted to optimise the price positionings with the aim of sustaining demand in the various types of sales context; this support is still a phenomenon - albeit no longer new - of specialised mass market, i.e. chains dedicated to personal and home products. The slowdown in the trend in large retail outlets is again confirmed, falling by nearly five percentage points for a value of 2,026 million euros. The growth and dynamic impact of the new single-brand stores continues, marking the real break with traditional consumption habits; they will soon be reclassified as a new type of channel.

Higher-than-average growth is seen in **domicile** (door-to-door) **sales**, now no longer just a new idea for getting through the recession. The value of sales in 2013 exceeded 450 million euros, meaning an increase of 4.5 percentage points. It's important to remember that one third of this channel comprises sales of make-up.

Weight of distribution channels in 2013



New product supply approaches and a specialist customer service are behind the success of this channel, which accounts for nearly 5% of total spending on cosmetics.

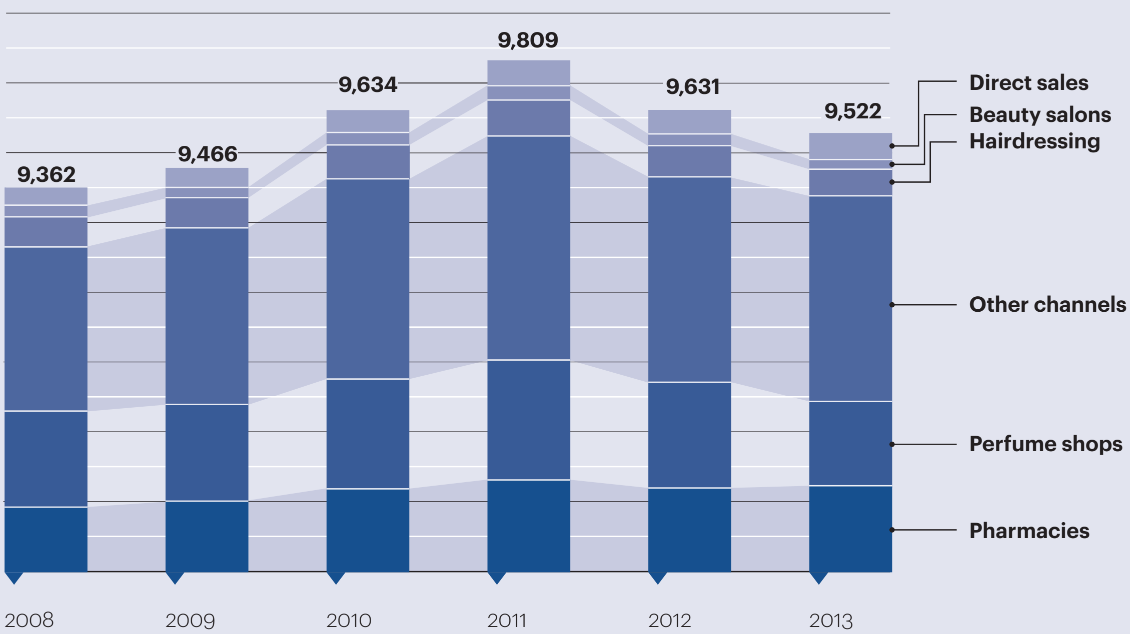
In the direct sales group, **mail order sales** also went up, increasing by 4 percentage points with a market value of 68 million euros. Purchases via the Internet are clearly evolving and can no longer be considered a marginal factor. They will be included with the processing figures that, when the distribution methods are reviewed, could turn out to be even higher.

2013 saw the continuing fall in the consumption of cosmetics in the professional channels, exceeding 730 million euros and equal to 8.7% of total consumption. The negative economic situation is having a harder effect on beauty and hairdressing salons than on the traditional channels. Salons are receiving fewer clients and are shifting their consumption to alternative channels, do-it-yourself and substitute products, with a clear reduction not only in cosmetics linked to the actual salon service but also in retail products.

The declining trend of the past few years in **beauty salons** is confirmed: -5.5%, for a value just above 240 million euros. This channel not only suffers the lack of a specific identity and the inability to respond to changing consumption needs, but is still marked by a certain rigidity of prices and by the aggressive policies of the leading market players.

The same sharp fall is noted in **hairdressing salons**, with a reduction of 8.4% and a value of little more than 590 million euros: also here, there has been a fall-off in client numbers with a clear effect on the number and value of the receipts. Having said this, there are exceptions: some salons have, in fact, tackled this stagnant period with strategies to segment services and treatments.

Historical trend of consumption
(million euro)



Following tradition, every year the Statistics Dept. of Cosmetica Italia carries out a detailed analysis of product-based consumption, cross-checking the data obtained from various research institutes with the existing databases and the analyses derived from internal statistics, constantly updated for each sales channel.

The focus of businesses on market developments, international changes and, at the same time, investments in research and innovation has had a fundamental role in sustaining some segments in this unusual period when the industry is marked by significant trends such as an increased range, product segmentation and consumption polarisation. For 2013 too, it is important to highlight the ever wider outlook on the web, with social communication and promotion no longer seen as merely "incidental" by the companies of this sector.

PRODUCTS FOR BODY CARE

In 2013, the segment given over to body care was still the main consumption group for Italian habits, covering 16.3% of total sales for a value of 1,335 million euros. The general decrease of 1.6 percentage points is seen across the various product sub-categories; two counter-trends emerge with the *multi-purpose creams* (+0.5%, with a sales value of 76 million euros) and toners and specific areas (growing by 0.6%). With 410 million euros and a negative trend of 0.7%, *deodorants and antiperspirants* cover 31% of sales for this family of products. There was a more significant drop (with the exception of sales in pharmacies and para-pharmacies) of *sunscreens and pigmenting products* (-2.1% with a sales value of 385 million euros) and *body waters and oils* (-6.2% for a value of just under 30 million euros).
The volume of *moisturisers and body nutrient creams* remained above 200 million euros, despite the collapse of sales in the perfume shops channel.

Greater focus on web and social media

Further consumption polarisation

PRODUCTS FOR FACE CARE

Products dedicated to skin-care represent 13% of Italian cosmetics consumption, with 1,251 million euros and a flat end-of-year closure. 2013 saw a positive trend in relation to specialised distribution and the pharmacy channel; sales of this important product line continued to fall in the Italian perfume shops, however. Examining the trend of the product categories, we can see a slow-down in *anti-ageing and anti-wrinkle creams* (-1% for a value of 490 million euros) and in *skin-toning lotions* (-3.8%). The second category of family products - *moisturising and nutrient creams* - remained stable, ending the year with an increase of +0.3%. A plus sign for other sub-segments too, like the *products for skin impurities* that saw a rise of +0.9% for over 60 million euros, and *depigmenting products* that have grown by 8% in the last two years.

PRODUCTS FOR HAIR CARE

The product families sold on the cosmetics market include products for hair and scalp care, that saw a fall of 1.5% in 2013 for a value of around 1,140 million euros, confirming their third position in terms of sales via traditional channels. *Shampoos*, with 492 million euros sold, and *post-shampoo treatments*, *balsams and masks*, with 150 million euros, show a slight drop (of 1% and 0.3% respectively). The reverse holds true for *dyes and colour mousses* (+0.6%) - the second value family in this category - that ends the year with more than 250 million euros.

PERSONAL HYGIENE

The overall negative trend of the previous year continues again in 2013 for personal cleansing products in general and for the various types, falling by 2% for a value less than 1,070 million euros. A particularly marked decrease in *bath and shower products* and oils (-4%) and *soaps and syndets* (-2.5%). A negative sign for *liquid soaps* too (-1.7%), for more than 150 million euros. The only positive area was that of *intimate hygiene products*, growing by 1.8 percentage points.

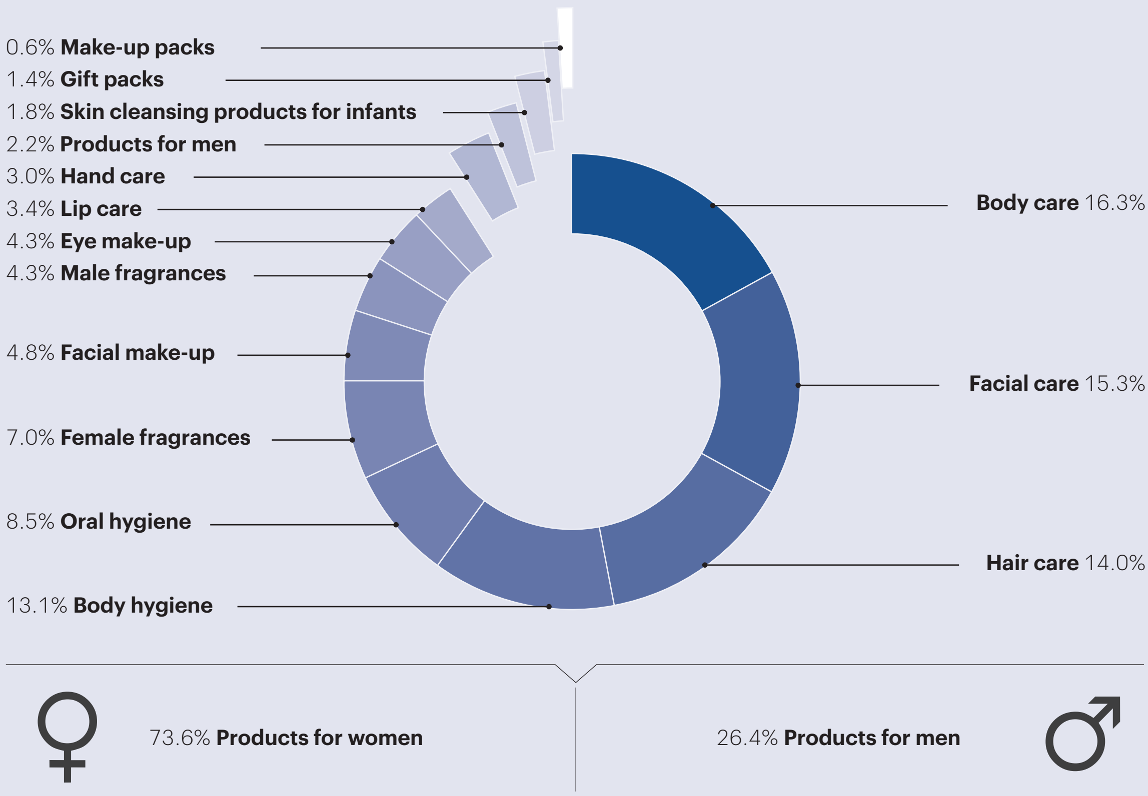
ALCOHOL-BASED PERFUME PRODUCTS

After the 2010-2011 period of acyclic hold and the fall in 2012, 2013 saw a downturn in *women's and men's fragrances* (1.4% and 1.8% respectively).
The drop still seems to be strongly linked to changes in the first sales channel, perfume shops, with a marked halt in the "traditional" sales outlets.

MAKE-UP

Make-up products show a positive trend, thanks above all to single brand distribution and the corners at mass level.
Eye make-up is proceeding well (+5.7%), along with make-up packs (+4%), but a slow-down is seen in *face make-up* (-0.5%) and, to an even greater degree, in *hand products* (-1.4%) and *lip products* (-2.2%). The counter-trend of this important area still stands out however at such a difficult time. In particular, *liners and pencils* reveal a figure of +12.7%, for a value now approaching 120 million euros.

Composition of the cosmetics market in 2013

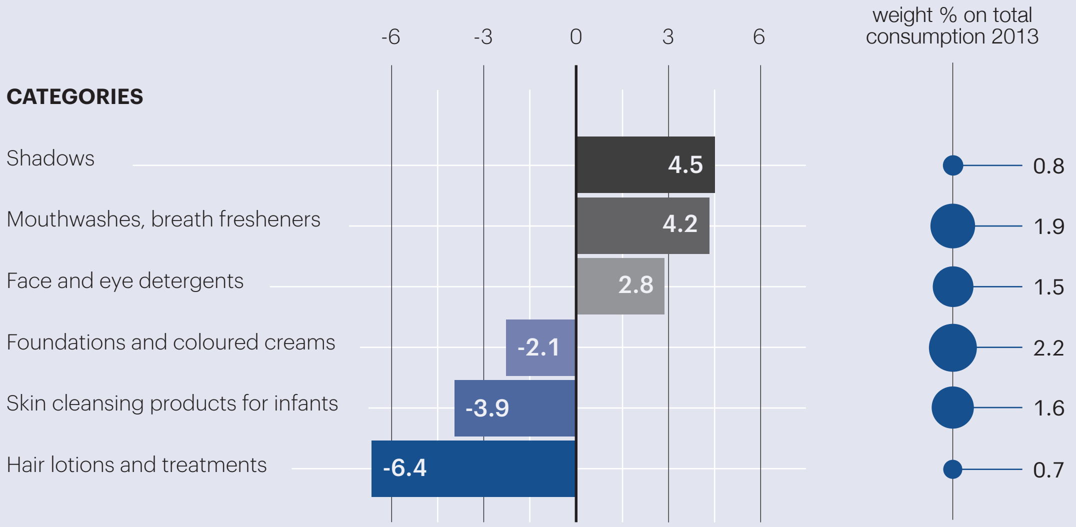


TRENDS COMPARISON

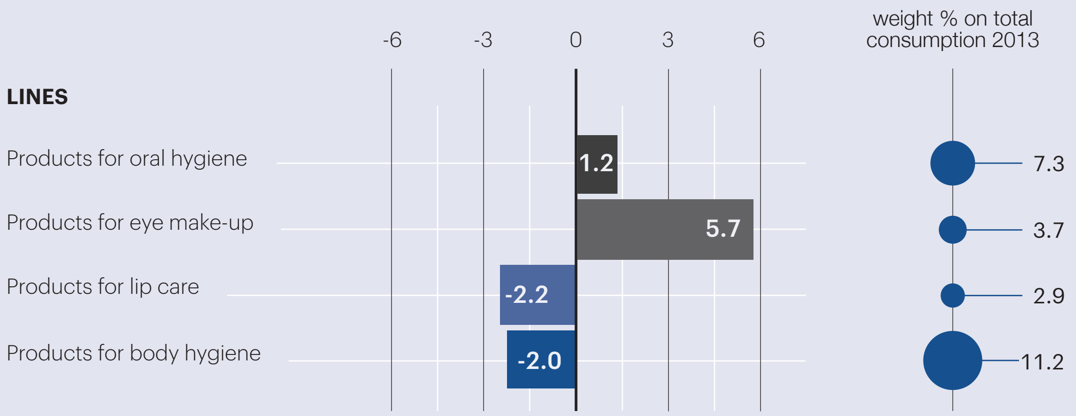
Thanks to a qualitative analysis of the positive and negative trends of the product families and individual products, we can view the development of the 2013 data "from above". As we've already seen, apart from *eye shadows* (part of the make-up area), the positive signals are coming from *mouthwashes* and *breath fresheners* and *face and eye detergents* and *make-up removers*. Negative trends on the other hand for *foundations and coloured creams* (to be re-examined in the light of the growing performance levels of multi-purpose creams like the *BB creams*), *skin cleansing products for infants* and, to a greater extent, *hair lotions and treatments*.

The redistribution of consumers' purchasing options (evident over the past few years) has a considerable effect on consumption trends, while the long wait for the end of the recession which, in recent years, has led to a fall in general consumption in Italy, seems not to have had any great influence yet on the cosmetics sector.

Rise & fall



Change % 2013/12



Change % 2013/12

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TURNOVER OF THE ITALIAN COSMETICS INDUSTRY

The global turnover of the cosmetics industry in 2013 came close to 9,300 million euros. In line with general national consumption, the domestic market fell by 1.2% and therefore had a negative impact, but for the third consecutive year exports sustained the overall turnover of the Italian firms. We're still waiting for confirmation of the data from Istat, but the figures for foreign sales show an increase of 11% compared with the previous year, for a value close on 3,200 million euros; it's expected that the trend for 2014 will continue in double figures.

As regards **domestic market sales channels**, the trend of the professional channels was down 7.7% and with a sell-in value of 700 million euros: the decrease in the number of visits to beauty salons and hairstylists is a familiar scenario for Italian cosmetics companies. Forecasts for next year show some improvement, but still with negative trends affecting the professional sector.

The decline in turnover of businesses investing in traditional channels was less

Developments in the Cosmetics Industry (million euro)	FINAL FIGURES 2012	CHANGE % 2012/11	PRE-FINAL FIGURES 2013	CHANGE % 2013/12	FORECASTS % 2014/13
Turnover Italy	**6,180**	**-1.8**	**6,100**	**-1.2**	**-0.8**
Traditional channels	5,419	-1.2	5,400	-0.3	-0.3
Professional channels	761	-5.7	700	-7.7	-4.3
Exports	**2,860**	**7.1**	**3,180**	**11.0**	**10.0**
Global turnover of the cosmetics industry	**9,040**	**0.9**	**9,280**	**2.6**	**2.6**

marked, showing -1.2% and a production value amounting to 5,400 million euros. At a time when consumption has slowed down considerably, only domicile (door-to-door) sales and those in herbalist shops and some specialist segments of the mass market sector have been able to adapt to changing consumer attitudes. Following the first three very negative quarters, the pharmacy ends 2013 with a slightly upward trend; hypermarkets and supermarkets are still on a negative track however.

Notwithstanding the general climate of uncertainty and national firms' lack of confidence in 2012-2013 (clearly shown by the wavering requests of the main partner countries too), the Italian cosmetics range continues to be recognised worldwide for its innovative formulas and manufacturers' service dynamics; these characteristics have enabled the Italian industry to make a name for itself on both traditional and emerging markets.

The value increase of **exports**, compared with a 0.8% growth in imports, confirms the constant gain in the trade balance of the sector: Italian businesses are continuing to recover market shares, confirming the flexibility that has long been an asset. Bearing this in mind, it's important to focus on the growth sustained in terms of the quantity of exports of Italian cosmetics too: +17.5%, which will hopefully encourage the integration of significant, well-organised investments by our firms.

In fact, thanks to the companies' renewed competitive edge, the **trade balance** has further expanded to exceed 1,500 million euros. With the excellent performance levels on international markets, the export-production ratio is more than 34%. This percentage is on the rise, but still relatively low for an industry recognised for its service and very high quality standards. The reinforcement of the upswing in world consumption levels, already predicted in late 2013, will create opportunities in the coming years to further develop these competitive characteristics.

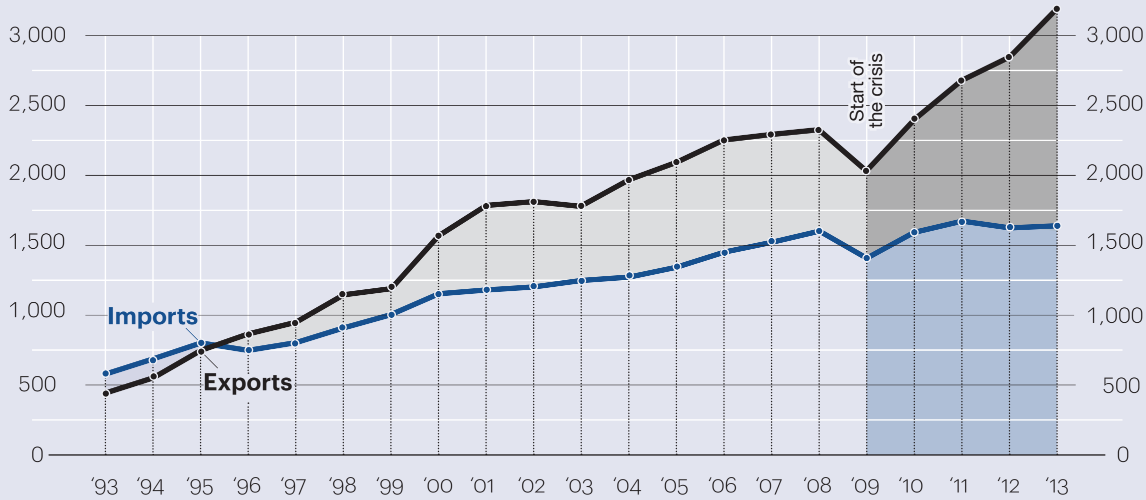
Current trends are confirmed by figures for exports of Italian cosmetics by destination: all the first ten countries, in fact, show a decidedly positive trend. In particular, the growth of areas that have long been important for Italian exports is significant; for

Cosmetics trade balance
(million euro)

	2010	2011	2012	CHANGE % 2012/11	PRE-FINAL FIGURES 2013	CHANGE % 2013/12
Imports	1,577	1,660	1,626	-2.0	1,640	+0.8
Exports	2,403	2,671	2,861	+7.1	3,180	+11.0

1,540
2013 trade balance

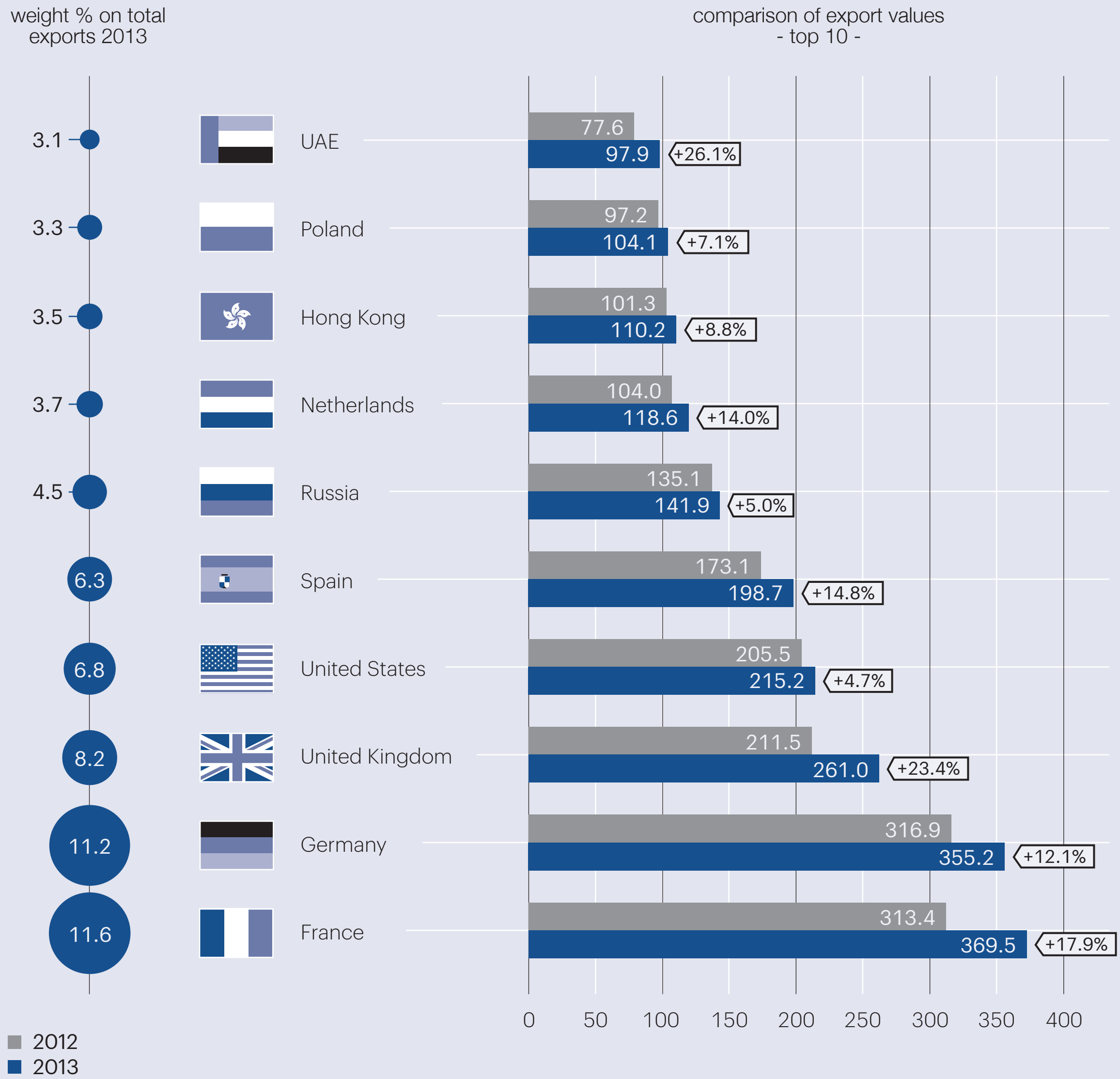
34.2%
2013 exports/turnover



example France (+17.9%), again in first place after being overtaken by Germany in 2012, and the United Kingdom (+23.4%) that has exceeded 260 million euros.

A notable jump was made by the United Arab Emirates (+26.1%) - a market that had been declining the previous year; it will inevitably have a more influential role in future years. Widening our view to the first twenty countries, we can see that Japan, Singapore, Korea and Turkey - increasingly important players in the international economic panorama - are gaining an ever stronger foothold amongst the preferred export destinations for Italian cosmetics.

Italian cosmetics industry exports



Source: processing by Cosmetica Italia Statistics Dept. of ISTAT data, values in million euro

2013 witnessed extremely positive trends for Denmark (+21%) and Switzerland (+15%) as well.

Finally, an analysis of the **macro-categories of exported products** shows similar trends for exports and the make-up segment, increasing by more than 10 percentage points. The first major value group - alcohol-based perfume products - is also growing: with over 800 million euros of world exports, it ended 2013 with an increase of 12%.

The new market trends outside Europe conditioned the situation of last year, favouring those businesses able to fully grasp the complete meaning of the term "internationalisation" within commercial and strategic logics for the medium and long term, minimising those one-shot initiatives that distinguished the overseas activity of Italian small and medium enterprises until just a short time ago.

2014

Statistical appendix

Consumption of cosmetic products in 2013

	Pharmacies		Perfume shops		Other channels		*of which supermarkets and hypermarkets*		TOTAL	
1. HAIR AND SCALPCARE	**175.4**	**-0.3**	**72.1**	**-9.7**	**892.2**	**-1.0**	***489.2***	***-4.1***	**1,139.8**	**-1.5**
Shampoos	91.5	0.8	12.0	-8.9	388.4	-1.1	*214.2*	*-3.8*	492.0	-1.0
Lotions and shock treatments	52.3	-7.1	1.7	-5.8	16.3	-4.1	*8.4*	*-6.7*	70.3	-6.4
Dyes and coloured mousses	19.5	10.9	35.1	-10.1	196.7	1.8	*98.1*	*-2.0*	251.2	0.6
Lacquers	0.5	5.1	6.6	-9.1	75.5	-1.2	*40.1*	*-3.1*	82.6	-1.8
Post-shampoo treatments, balsams and masks	10.8	10.0	8.0	-8.9	130.3	-0.5	*80.3*	*-4.0*	149.1	-0.3
Fixers and structuring mousses	0.1	-20.4	3.4	-11.1	34.3	-3.7	*17.7*	*-7.0*	37.9	-4.4
Gels, waters and gums	0.7	-8.2	5.4	-10.5	50.7	-8.4	*30.4*	*-11.6*	56.8	-8.6
2. PRODUCTS FOR FACE CARE	**473.1**	**0.7**	**415.6**	**-3.1**	**362.7**	**2.9**	***203.3***	***-0.9***	**1,251.3**	**0.0**
Face and eye detergents and make-up removers	44.9	4.0	36.9	-0.7	62.5	4.2	*34.6*	*0.0*	144.2	2.8
Facial tissues	3.8	-2.8	4.7	0.0	37.8	1.7	*17.3*	*-0.4*	46.2	1.2
Toning lotions	6.3	-3.1	15.9	-7.8	15.3	0.4	*10.6*	*-4.6*	37.6	-3.8
Pericoular area and specific zones	42.1	4.6	71.9	-1.2	16.9	2.0	*11.6*	*-4.0*	130.9	1.0
Moisturising and nutrient creams	117.6	-2.6	58.6	3.5	109.3	1.8	*58.3*	*-1.1*	285.4	0.3
Anti-ageing and anti-wrinkle creams	181.5	1.1	204.3	-5.5	105.0	4.8	*64.5*	*0.2*	490.9	-1.0
Masks and exfoliant scrubs	10.7	-5.4	14.9	-3.9	10.8	1.6	*3.4*	*-9.8*	36.4	-2.8
Products for skin impurities	50.2	2.5	8.4	-3.4	2.8	-11.2	*1.4*	*-12.0*	61.3	0.9
Depigmenting products	16.0	2.5	0.0	0.0	2.4	5.3	*1.6*	*0.0*	18.4	2.9
3. PRODUCTS FOR FACIAL MAKE-UP	**52.4**	**-0.5**	**186.5**	**-5.4**	**151.2**	**6.3**	***21.0***	***-14.3***	**390.0**	**-0.5**
Foundations and coloured creams	24.3	-0.2	102.5	-5.4	82.4	1.8	*11.5*	*-17.5*	209.3	-2.1
Face powder	4.8	3.3	15.8	-6.4	21.3	13.6	*3.3*	*-7.7*	42.0	4.0
Cheek correctors, blushers and bronzing powders	23.2	-1.6	68.2	-5.2	47.4	11.7	*6.2*	*-11.3*	138.8	0.6
4. MAKE-UP PACKS	**0.1**	**18.1**	**34.0**	**5.2**	**14.3**	**1.1**	***2.6***	***0.0***	**48.4**	**4.0**
5. PRODUCTS FOR EYE MAKE-UP	**18.7**	**2.1**	**150.6**	**-2.4**	**180.1**	**14.2**	***23.9***	***-11.2***	**349.4**	**5.7**
Shadows	2.8	-15.7	30.2	-3.2	42.8	12.5	*2.3*	*-22.6*	75.8	4.5
Mascara	8.6	0.6	71.8	-3.3	75.7	6.9	*14.5*	*-13.8*	156.1	1.6
Liners and pencils	7.4	13.1	48.6	-0.6	61.5	26.0	*7.2*	*-0.5*	117.5	12.7
6. PRODUCTS FOR LIP CARE	**46.0**	**-2.0**	**87.2**	**-5.8**	**145.8**	**0.1**	***27.3***	***-13.2***	**279.0**	**-2.2**
Lipsticks and lip glosses	11.2	-9.1	72.0	-6.4	97.2	0.8	*9.9*	*-15.9*	180.4	-2.8
Liners and pencils	1.2	9.1	14.6	-2.2	16.9	15.3	*0.8*	*-15.3*	32.7	6.6
Protections, colourless foundations and sun sticks	33.7	0.3	0.5	-14.8	31.7	-8.5	*16.6*	*-11.5*	65.9	-4.3
7. PRODUCTS FOR HAND CARE	**37.0**	**-7.0**	**48.7**	**-7.9**	**157.0**	**2.4**	***41.7***	***-10.7***	**242.8**	**-1.4**
Creams, gels, lotions and nail products	29.2	-5.7	6.5	-6.1	42.8	-2.9	*19.6*	*-9.3*	78.4	-4.2
Nail varnishes	6.6	-14.5	35.3	-12.0	88.8	7.6	*12.6*	*-14.3*	130.7	0.3
Solvents and other products	1.3	5.6	6.9	17.7	25.5	-5.0	*9.5*	*-8.5*	33.7	-0.7

	Pharmacies		Perfume shops		Other channels		*of which supermarkets and hypermarkets*		TOTAL	
8. PRODUCTS FOR BODY CARE	**443.9**	**0.9**	**147.2**	**-11.4**	**743.8**	**-0.9**	***372.7***	***-4.8***	**1,334.9**	**-1.6**
Moisturisers, nutrients and exfoliant scrubs	89.8	-2.0	31.5	-10.5	85.7	2.0	*40.5*	*-2.1*	206.9	-1.8
Multi-purpose creams	32.0	3.7	1.6	-13.8	42.7	-1.1	*21.3*	*-5.4*	76.3	0.5
Body waters and oils	15.7	0.2	8.3	-15.8	5.7	-7.2	*3.5*	*-12.8*	29.6	-6.2
Anti-cellulite products	65.2	-0.6	11.3	-4.5	21.8	-4.4	*11.3*	*-11.0*	98.2	-1.9
Firming agents, specific zone and anti-ageing products	34.6	1.1	7.6	-16.5	18.0	8.9	*10.7*	*3.5*	60.3	0.6
Deodorants and antiperspirants	57.3	-2.2	19.9	-16.6	332.7	0.7	*185.6*	*-2.9*	409.9	-0.7
Hair removers	3.7	-4.7	3.7	-13.8	61.0	-4.1	*36.1*	*-6.8*	68.4	-4.7
Sunscreens and pigmenting products	145.6	4.3	63.3	-9.7	176.3	-4.0	*63.9*	*-9.8*	385.2	-2.1
9. PRODUCTS FOR BODY HYGIENE	**257.1**	**1.1**	**42.4**	**-12.5**	**766.3**	**-2.4**	***425.7***	***-5.4***	**1,065.9**	**-2.0**
Soaps and syndets	36.3	2.0	3.4	-8.0	73.4	-4.3	*41.5*	*-5.8*	113.0	-2.5
Liquid soaps	12.7	-1.3	1.9	-8.0	139.5	-1.7	*83.4*	*-4.3*	154.1	-1.7
Bath and shower foams, salts, powders and oils	48.8	-3.2	31.2	-13.9	359.7	-3.1	*200.6*	*-6.2*	439.8	-4.0
Talcs and powders	3.7	-3.1	2.8	-8.0	22.6	-0.6	*11.5*	*-0.9*	29.2	-1.7
Products for foot hygiene	20.2	-6.8	1.0	-8.0	18.4	-6.3	*13.2*	*-9.6*	39.6	-6.6
Products for intimate hygiene	135.3	4.2	2.2	-9.0	152.7	-0.1	*75.5*	*-4.3*	290.2	1.8
10. PRODUCTS FOR ORAL HYGIENE	**135.0**	**3.0**	**4.4**	**0.0**	**553.4**	**0.7**	***301.8***	***-1.9***	**692.8**	**1.2**
Toothpastes	60.8	2.7	4.0	0.0	445.5	-0.2	*239.6*	*-2.7*	510.4	0.1
Mouthwashes, breath fresheners	74.1	3.3	0.4	0.0	107.9	4.8	*62.1*	*1.1*	182.4	4.2
11. SKIN CLEASING PRODUCTS FOR INFANTS	**96.8**	**-4.0**	**4.7**	**0.0**	**46.2**	**-4.0**	***27.2***	***-8.4***	**147.6**	**-3.9**
12. PRODUCTS FOR MEN	**12.8**	**-3.1**	**41.1**	**-8.6**	**125.5**	**-6.3**	***61.9***	***-8.8***	**179.4**	**-6.6**
Soaps, shaving foams and gels	4.9	-4.0	6.0	-8.6	70.6	-5.7	*34.9*	*-7.6*	81.4	-5.8
After shave products	4.1	-2.4	11.0	-8.6	43.7	-6.2	*20.7*	*-9.0*	58.8	-6.4
Treatment creams	3.9	-2.7	24.1	-8.6	11.3	-11.0	*6.3*	*-14.0*	39.3	-8.8
13. ALCOHOL-BASED PERFUME PRODUCTS	**8.1**	**6.5**	**773.1**	**-1.9**	**144.9**	**-0.2**	***23.3***	***-11.0***	**926.2**	**-1.6**
Toilet waters and perfumes for women	7.7	6.6	491.4	-1.7	72.0	-0.1	*11.7*	*-9.9*	571.1	-1.4
Toilet waters and perfumes for men	0.4	4.1	281.7	-2.2	73.0	-0.2	*11.5*	*-12.1*	355.1	-1.8
14. GIFT PACKS	–	–	**105.5**	**4.4**	**11.4**	**0.0**	***4.6***	***0.0***	**116.9**	**4.0**
Gift packs for women	–	–	62.6	6.5	4.8	0.1	*2.0*	*0.0*	67.4	6.0
Gift packs for men	–	–	42.9	1.5	6.6	0.0	*2.6*	*0.0*	49.5	1.3
Total traditional channels	**1,756.5**	**0.3**	**2,113.1**	**-3.8**	**4,294.8**	**0.1**	***2,026.2***	***-4.7***	**8,164.4**	**-0.9**
Domicile sales									**456.4**	**4.5**
Mail order sales									**67.9**	**4.0**
Professional beauty salons and centres									**242.1**	**-5.5**
Hairdressing									**590.9**	**-8.4**
Total consumption									**9,521.6**	**-1.2**

Note: values are approximate to one decimal figure, therefore the partial sums of rows and columns may not be exact

Imports

	Quantities (tons)			Value (thousands of euro)		
	dec-12	dec-13	change%	dec-12	dec-13	change%
Shampoos	41,934	40,732	-2.9%	87,534	82,577	-5.7%
Hair preparations	383	333	-13.0%	2,299	2,008	-12.6%
Lacquers	1,892	1,499	-20.8%	7,533	6,838	-9.2%
Hair lotions and other products for hair care	30,226	31,901	5.5%	122,788	127,460	3.8%
Powders and compact powders	1,252	1,445	15.4%	23,745	22,892	-3.6%
Creams and other products	42,210	42,922	1.7%	522,847	533,491	2.0%
Lip make-up products	876	788	-10.0%	42,812	39,576	-7.6%
Products for eye make-up	1,926	1,752	-9.0%	86,655	91,487	5.6%
Nailcare products	3,613	3,457	-4.3%	65,816	63,128	-4.1%
Toilet soaps	21,369	22,401	4.8%	39,864	42,658	7.0%
Bath preparations	13,804	15,155	9.8%	29,525	30,397	3.0%
Personal deodorants	8,128	8,379	3.1%	54,948	56,275	2.4%
Toothpastes	26,672	29,289	9.8%	90,120	99,145	10.0%
Other preparations for oral hygiene	7,365	11,011	49.5%	36,508	45,497	24.6%
Shaving, pre-shave and after shave products	4,496	3,913	-13.0%	21,962	18,825	-14.3%
Perfumes and eau de parfums	7,744	12,056	55.7%	123,649	127,724	3.3%
Toilet waters and eau de colognes	7,809	7,859	0.6%	226,037	207,839	-8.1%
Other perfume and toiletry products	6,676	6,944	4.0%	41,411	41,020	-0.9%
TOTAL	**228,376**	**241,836**	**5.9%**	**1,626,052**	**1,638,836**	**0.8%**

Imports: macro-categories

	Quantities (tons)			Value (thousands of euro)		
	dec-12	dec-13	change%	dec-12	dec-13	change%
Products for hair care	74,435	74,466	0.0%	220,154	218,882	-0.6%
Products for make-up	7,668	7,442	-3.0%	219,028	217,083	-0.9%
Products for body care	42,210	42,922	1.7%	522,847	533,491	2.0%
Personal hygiene	43,301	45,935	6.1%	124,337	129,330	4.0%
Oral hygiene	34,037	40,300	18.4%	126,628	144,642	14.2%
Products for men	4,496	3,913	-13.0%	21,962	18,825	-14.3%
Alcohol-based perfume products	15,553	19,915	28.0%	349,685	335,563	-4.0%
Other products	6,676	6,944	4.0%	41,411	41,020	-0.9%
TOTAL	**228,376**	**241,836**	**5.9%**	**1,626,052**	**1,638,836**	**0.8%**

Exports

	Quantities (tons)			Value (thousands of euro)		
	dec-12	dec-13	change%	dec-12	dec-13	change%
Shampoos	75,015	79,505	6.0%	145,347	153,654	5.7%
Hair preparations	1,488	1,586	6.6%	8,128	7,908	-2.7%
Lacquers	7,521	10,204	35.7%	21,007	29,394	39.9%
Hair lotions and other products for hair care	81,343	82,576	1.5%	412,758	436,441	5.7%
Powders and compact powders	4,195	4,875	16.2%	103,795	109,161	5.2%
Creams and other products	45,363	47,596	4.9%	539,590	564,887	4.7%
Lip make-up products	2,020	2,285	13.1%	74,927	88,101	17.6%
Products for eye make-up	8,173	7,878	-3.6%	262,908	286,405	8.9%
Nailcare products	3,127	3,458	10.6%	39,108	47,150	20.6%
Toilet soaps	73,262	112,526	53.6%	131,639	183,218	39.2%
Bath preparations	27,643	36,599	32.4%	59,824	77,247	29.1%
Personal deodorants	13,883	14,402	3.7%	71,484	74,693	4.5%
Toothpastes	3,779	3,659	-3.2%	20,663	22,322	8.0%
Other preparations for oral hygiene	50,616	65,369	29.1%	96,028	125,693	30.9%
Shaving, pre-shave and after shave products	14,311	13,424	-6.2%	47,529	40,413	-15.0%
Perfumes and eau de parfums	9,055	9,013	-0.5%	245,045	263,031	7.3%
Toilet waters and eau de colognes	18,467	21,352	15.6%	488,615	558,210	14.2%
Other perfume and toiletry products	18,014	20,825	15.6%	92,295	108,239	17.3%
TOTAL	**457,274**	**537,130**	**17.5%**	**2,860,690**	**3,176,168**	**11.0%**

Exports: macro-categories

	Quantities (tons)			Value (thousands of euro)		
	dec-12	dec-13	change%	dec-12	dec-13	change%
Products for hair care	165,367	173,871	5.1%	587,240	627,397	6.8%
Products for make-up	17,515	18,496	5.6%	480,738	530,817	10.4%
Products for body care	45,363	47,596	4.9%	539,590	564,887	4.7%
Personal hygiene	114,788	163,526	42.5%	262,947	335,158	27.5%
Oral hygiene	54,395	69,028	26.9%	116,691	148,015	26.8%
Products for men	14,311	13,424	-6.2%	47,529	40,413	-15.0%
Alcohol-based perfume products	27,522	30,365	10.3%	733,660	821,241	11.9%
Other products	18,014	20,825	15.6%	92,295	108,239	17.3%
TOTAL	**457,274**	**537,130**	**17.5%**	**2,860,690**	**3,176,168**	**11.0%**

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