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COSMOPROF
WORLDWIDE BOLOGNA

COSMETICS BY NUMBERS

MARCH 2023

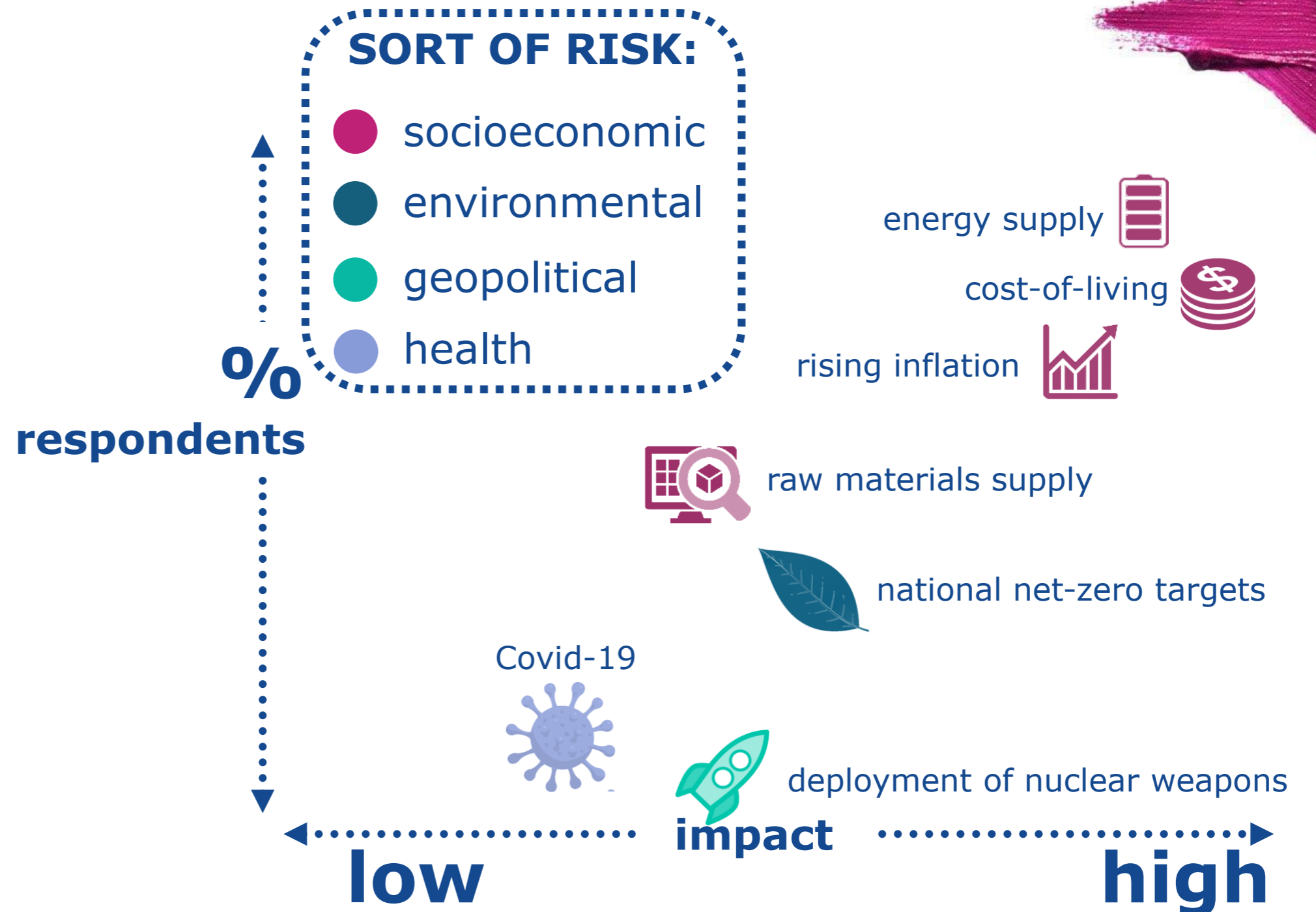


COSMETICA ITALIA
the personal care association



Worldwide scenario between threats and opportunities

From a global study proposed to the **World Economic Forum** conducted on more than 1,200 respondents, including government institutions, economic operators and academics, the questions were asked what will be the **main phenomena** that will impact globally in **2023**.





The Italian cosmetics industry challenges: cohesion with the scenario and reaction



cost and supply of raw materials

The main events declared by the cosmetic companies that will have the greatest impact in 2023 are the **cost** (50.9%) and **supply** (20.8%) of **raw materials**, followed by the increase in **energy supply** (43.4%). The reactivity of the Italian cosmetics industry is demonstrated by the **inflation level** (3.5-4.0%), nearly half of the total Italian consumption basket in January 2023 and by the acceleration of the **exploration of non-EU destinations** (from 33% of 2020 to 38% in 2022).



energy supply



cost-of-living



rising inflation

The Italian cosmetics turnover

13.3

billion

+12.1

change 22-21

preliminary 2022

14.4

billion

+7.7

change 23-22

forecast 2023

+10,5
change 22-19

The Italian cosmetics turnover in details

	preliminary 2022	change 22-21	forecast 23-22
turnover in Italy	7,493	7.6	5.9
<i>of which generated in traditional and digital channels</i>	6,731	7.9	6.0
<i>of which generated in professional channels</i>	762	5.2	5.1
exports (turnover abroad)	5,851	18.5	10.0
total turnover of Italian cosmetics industry	13,344	12.1	7.7

Data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and change from previous period.





Italian cosmetics exports

5.9

billion

+18.5

change 22-21

preliminary 2022



6.4

billion

+10

change 23-22










forecast 2023

Evolution of Italian cosmetics trade balance

	value 2019	value 2020	value 2021	preliminary 2022	forecast 2023
EXPORTS	4,985 mio/euro	4,260 mio/euro	4,939 mio/euro	5,851 mio/euro	6,400 mio/euro
	+0.8 change %	-14.5 change %	+16.0 change %	+18.5 change %	+10.0 change %
TRADE BALANCE (exports – imports)	2,776 mio/euro	2,328 mio/euro	2,742 mio/euro	3,282 mio/euro	

Istat data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and change from previous period.

The leading sectors of Made in Italy

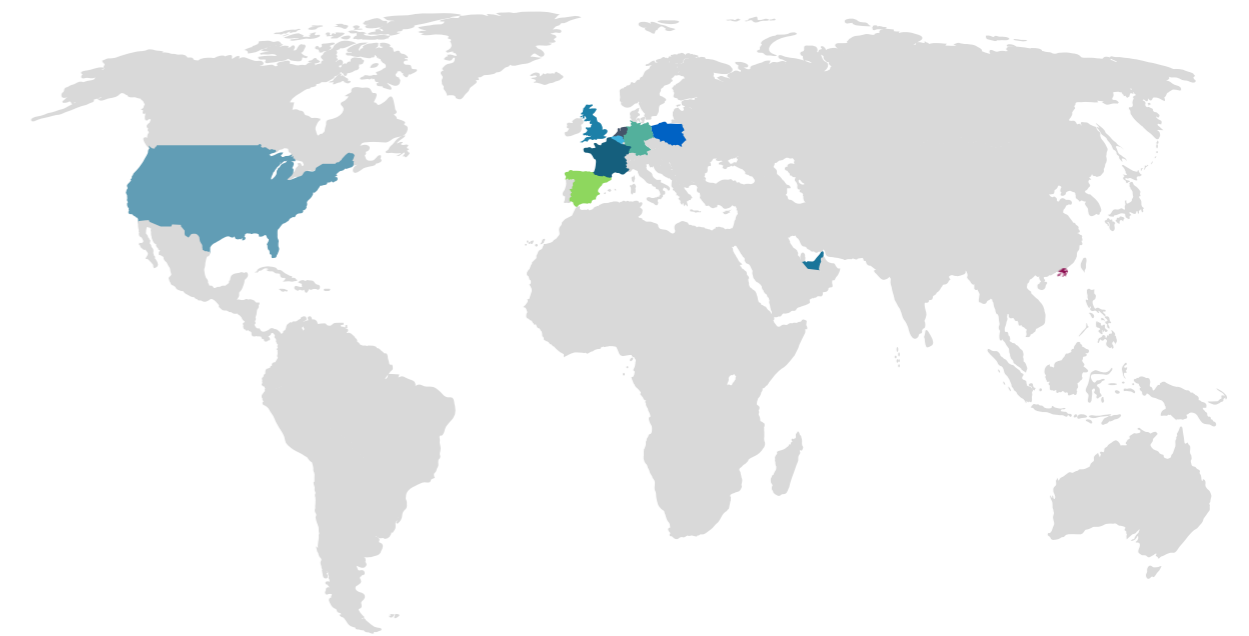
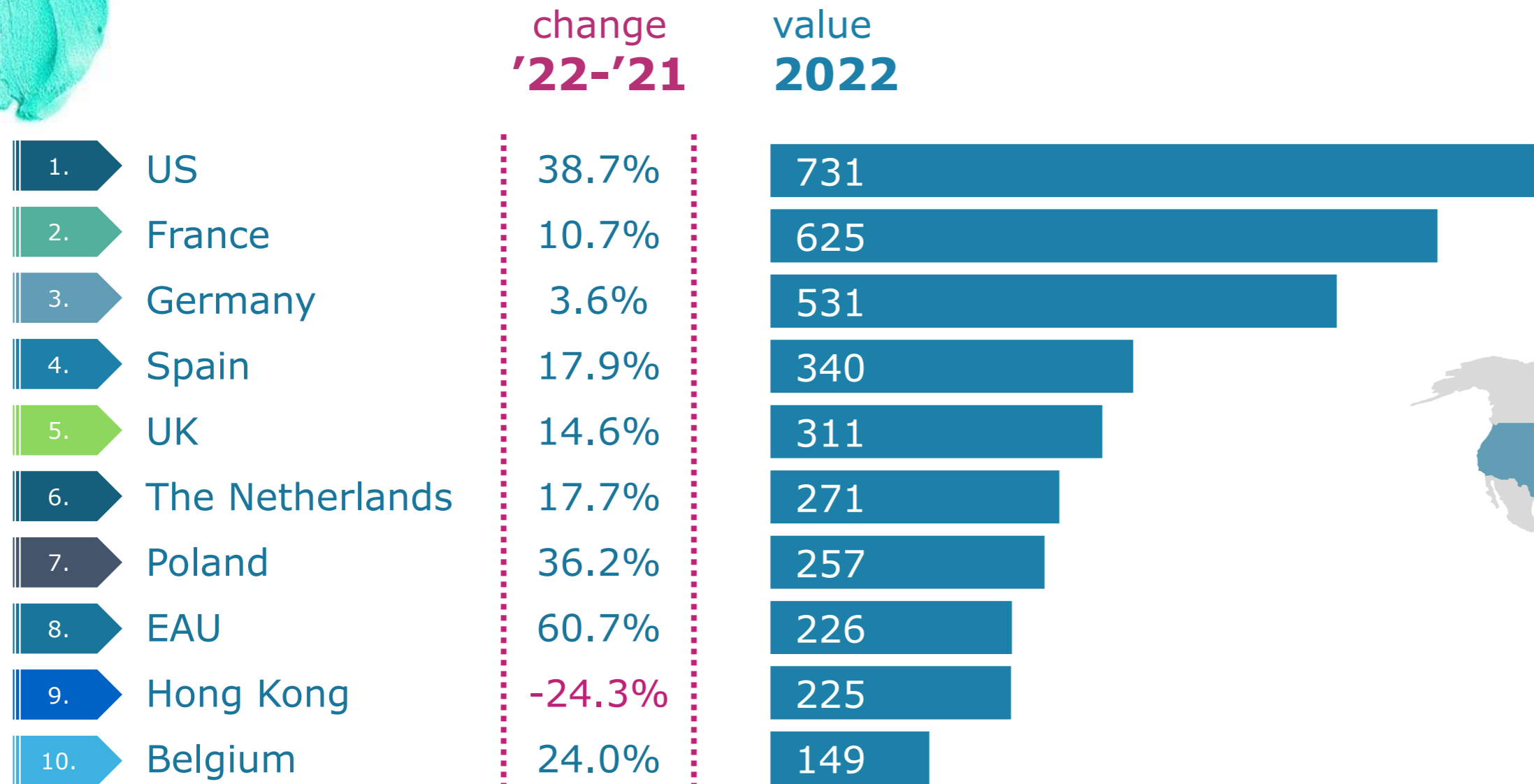
	EXPORTS 22	CHANGE EXP 22-21	TRADE BALANCE 22
 fashion	22,078	16.2%	6,427
 furniture	12,402	13.4%	9,291
 jewellery	9,721	19.5%	6,541
 wine	7,873	9.8%	7,358
 cosmetics	5,851	18.5%	3,282
 eyewear	4,776	21.0%	3,384
 boats & yacht	3,389	13.3%	2,970
 pasta	3,086	35.4%	3,062
 motorbikes	1,975	22.6%	807

Istat data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and change between 2022 and 2021.





Italian cosmetics exports in 2022 the top 10 destinations



Istat data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and change between 2022 and 2021.

Breakdown of Italian cosmetics exports in 2022 by category

	value 2022	change '22-'21	trade balance (exports – imports '22)
fragrances	1.488	26.5%	312
skin care	1.325	15.6%	179
hair care	1.285	16.7%	184
make-up & nails	950	20.0%	158
body hygiene	347	10.0%	32
oral hygiene	240	1.1%	3
products for men	40	3.1%	1
<i>other cosmetics products</i>	<i>175</i>	<i>32.2%</i>	<i>43</i>
Italian cosmetics exports	5,851	+18.5%	3,282

Istat data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and change between 2022 and 2021.

Channels & Italian cosmetics market in 2022



	preliminary 22 (value '22)	change 22-21 (%)	forecast 23-22 (%)
mass market	4,819	+6.0%	+5.1%
perfume shops	2,217	+18.1%	+11.0%
pharmacies	1,951	+4.6%	+3.2%
e-commerce	988	+13.4%	+12.0%
hairdressing salons	582	+5.8%	+5.5%
herbalist stores	378	+0.5%	+1.3%
direct sales	348	+1.2%	+1.5%
beauty salons	222	+5.1%	+5.5%
Italian cosmetics market	11,505	+8.1%	+6.3%

Data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and change from previous period.

Channels evolution in the Italian cosmetics market



	composition % 2019	composition % 2021	preliminary composition % 2022
mass market	42.5%	42.7%	41.9%
perfume shops	19.4%	17.6%	19.3%
pharmacies	17.4%	17.5%	17.0%
e-commerce	4.6%	8.2%	8.6%
hairdressing salons	5.4%	5.2%	5.1%
herbalist stores	4.1%	3.5%	3.3%
direct sales	4.5%	3.2%	3.0%
beauty salons	2.2%	2.0%	1.9%
Italian cosmetics market	10,817 mio/€	10,640 mio/€	11,505 mio/€



Data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and composition between 2022 and pre-pandemic period.

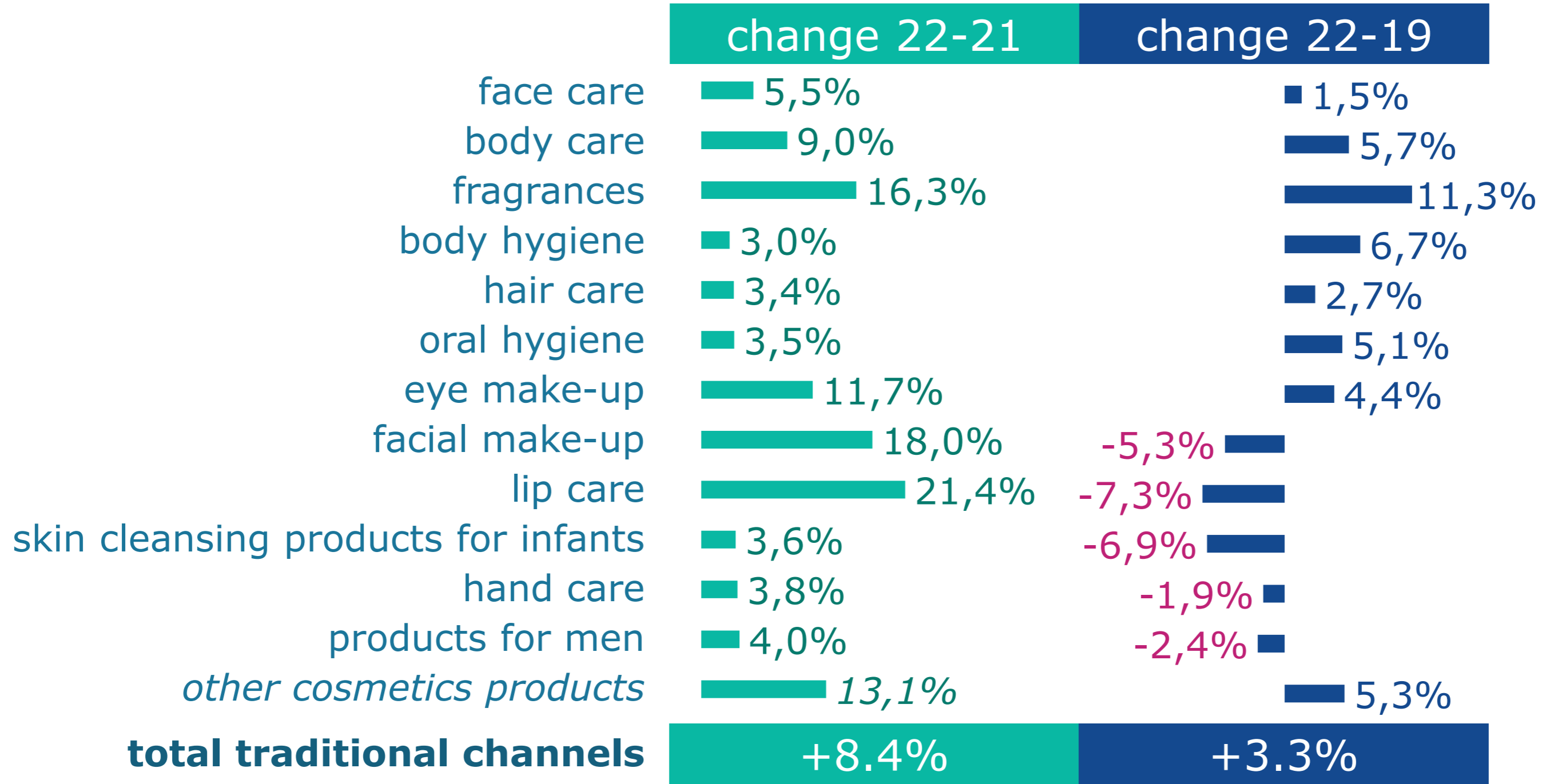
Evolution of cosmetics basket in Italy

composition % 19	composition % 20	composition % 21	composition % 22	
16.7%	16.5%	16.8%	16.4%	face care
14.9%	15.4%	15.2%	15.3%	body care
12.6%	11.1%	12.7%	13.6%	fragrances
11.0%	13.0%	12.0%	11.4%	body hygiene
10.7%	12.3%	11.2%	10.7%	hair care
7.3%	8.3%	7.8%	7.4%	oral hygiene
6.0%	5.4%	5.9%	6.1%	eye make-up
6.5%	5.2%	5.5%	6.0%	facial make-up
5.1%	4.0%	4.1%	4.6%	lip care
2.9%	3.0%	2.8%	2.6%	skin cleansing products for infants
2.5%	2.4%	2.5%	2.3%	hand care
1.6%	1.6%	1.6%	1.5%	products for men
1.5%	1.4%	2.1%	2.2%	<i>other cosmetics products</i>
8,700 MIO/€	7,753 MIO/€	8,288 MIO/€	8,987 MIO/€	total traditional channels

Data processed by Cosmetica Italia Statistics Dept. Values in million of Euros and composition between 2022 and 2021 in traditional channels (professional channels excluded).



Evolution of **cosmetics basket** in Italy



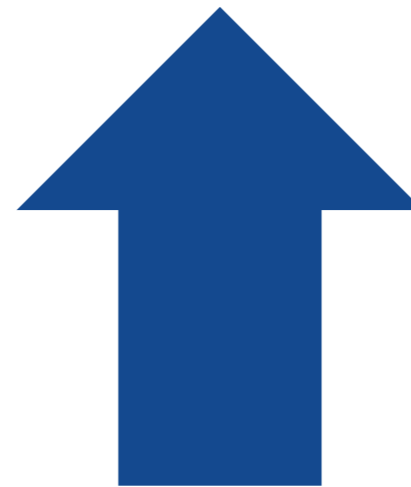
Data processed by Cosmetica Italia Statistics Dept. Changes between 2022-2021 and 2022-2019 in traditional channels (professional channels excluded).

Up & down of Italian cosmetics consumption in 2022 in traditional channels

lipsticks & lip glosses **+23.4%**

sunscreens **+19.6%**

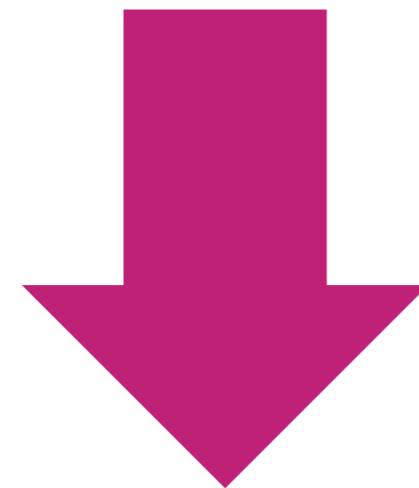
cheek correctors,
blushes & clays **+18.5%**



dyes and coloured mousses **-4.7%**

liquid soaps **-5.9%**

firming agents & specific
zone products **-6.0%**





Evolution the of natural-derived / organic and sustainable cosmetics market in Italy

	Value 2021	Value 2022	change 22-21
Natural-derived and organic cosmetics	1,159	1,215	4.8%
<i>Overlap of the classifications</i>	1.486	1,649	11.0%
Sustainable cosmetics	1,494	1,678	12.3%
Total	2,654	2,893	9.0%

In the 2022 the weight of the **NO&SC** market in Italy is about **25%** on the total cosmetics market (**11,505** million of Euros).



2019

Cosmetics macro-categories in Italian traditional channels in pre-pandemic period

categories/channels	total %	pharmacies %	SSS-Drug %	perfume shops %	hyper e supermarkets %
skin care	33.2%	52.6%	26.2%	27.1%	28.9%
make-up & nails	18.6%	10.2%	15.3%	22.1%	4.0%
skin cleansing	15.1%	18.7%	17.2%	1.4%	25.7%
fragrances	12.7%	1.1%	11.7%	40.6%	0.8%
hair care	11.4%	9.7%	18.3%	1.7%	20.9%
oral hygiene	7.4%	7.2%	9.1%	0.2%	16.9%
products for men	1.6%	0.5%	2.1%	1.8%	2.4%
total traditional channels	9,093	1,877	1,581	2,093	1,720

Data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and composition in traditional channels in 2019 (professional channels excluded).

The driving cosmetics macro-categories in Italian traditional channels between 2022 and pre-pandemic period

categories/channels	total %	pharmacies %	SSS-Drug %	perfume shops %	hyper e supermarkets %
skin care	31.6%	53.3%	26.6%	25.8%	29.0%
make-up & nails	21.1%	9.4%	13.9%	25.9%	3.0%
skin cleansing	14.0%	18.6%	17.6%	1.4%	26.6%
fragrances	13.6%	1.1%	12.0%	43.4%	0.6%
hair care	10.7%	9.6%	19.0%	1.7%	21.2%
oral hygiene	7.4%	7.5%	9.1%	0.2%	17.4%
products for men	1.5%	0.4%	1.8%	1.7%	2.1%
total traditional channels	8,987	1,951	1,762	2,217	1,732

Data processed by Cosmetica Italia Statistics Dept.
 Values in million of Euros and composition in traditional channels in 2022 (professional channels excluded).



STATISTICAL DATA IN DETAILS

Consumption of cosmetic products in 2022

(1 of 4)



	total		pharmacies		perfume shops		mass market	
	2022	change 22-21	2022	change 22-21	2022	change 22-21	2022	change 22-21
HAIR CARE	958.0	3.4	188.0	1.0	38.4	22.9	731.7	3.2
Shampoos	448.3	5.7	100.9	5.5	9.9	46.4	337.5	4.9
Lotions and shock treatments	65.7	2.3	47.8	-3.4	7.5	66.3	10.4	1.8
Dyes and coloured mousses	165.4	-4.7	28.3	-5.6	9.2	-10.1	128.0	-4.0
Lacquers	60.3	6.8	0.3	7.2	2.4	7.6	57.7	6.8
Post-shampoo treatments, balsams and masks	151.0	4.7	10.2	-0.8	6.1	45.0	134.7	3.8
Fixers and structuring mousses	25.0	4.7	0.1	13.3	1.8	-1.1	23.1	5.2
Gels, waters and gums	42.2	6.3	0.4	5.8	1.5	1.1	40.2	6.6
FACE CARE	1,472.3	5.5	569.3	2.2	455.7	13.0	447.4	2.8
Face and eye detergents and make-up removers	166.6	8.9	54.5	6.9	39.8	16.9	72.3	6.5
Facial tissues	48.2	6.0	3.2	23.1	6.2	18.4	38.8	3.1
Toning lotions	37.7	5.0	5.9	1.8	17.7	10.4	14.1	0.1
Periocular area and specific zones	154.4	6.4	54.7	0.5	70.6	10.9	29.1	7.8
Moisturising and nutrient creams	246.5	3.3	100.8	-1.9	57.5	11.5	88.2	4.6
Anti-ageing and anti-wrinkle creams	653.1	5.7	258.2	1.9	235.2	14.9	159.7	0.1
Masks and exfoliant scrubs	75.8	-	13.9	-6.5	21.5	0.8	40.5	2.0
Products for skin impurities	65.6	5.9	57.5	6.3	6.1	2.8	2.1	3.6
Depigmenting products	24.5	8.5	20.7	12.4	1.1	15.2	2.7	-16.0

Data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and change between 2022 and 2021.

Consumption of cosmetic products in 2022

(2 of 4)

	total		pharmacies		perfume shops		mass market	
	2022	change 22-21	2022	change 22-21	2022	change 22-21	2022	change 22-21
FACIAL MAKE-UP	536.9	18.0	44.7	9.4	167.5	31.2	324.7	13.3
Foundations and coloured creams	282.3	15.8	26.3	10.2	92.0	24.7	164.0	12.2
Face powder	63.1	26.7	3.1	6.5	17.5	88.1	42.5	3.0
Cheek correctors, blushes and clays	191.5	18.5	15.3	8.7	58.0	30.2	118.2	14.8
MAKE-UP PACKS	55.0	16.4	0.2	-27.6	39.1	24.5	15.7	0.7
EYE MAKE-UP	546.7	11.7	32.2	6.7	140.5	16.4	374.0	10.5
Shadows	121.0	11.9	3.4	9.7	26.7	14.7	90.8	11.2
Mascaras	216.6	12.1	17.3	5.1	64.1	17.3	135.2	10.8
Liners and pencils	209.2	11.1	11.5	8.3	49.8	16.2	147.9	9.8
LIP CARE	409.9	21.4	63.2	30.0	84.4	40.5	262.3	14.5
Lipsticks and lip glosses	270.3	23.4	14.1	43.8	65.9	34.9	190.4	18.7
Liners and pencils	50.9	22.4	2.2	70.0	13.1	63.9	35.6	10.2
Protections, colourless foundations & sun sticks	88.7	15.0	47.0	25.1	5.4	66.2	36.3	-
HAND CARE	210.8	3.8	41.7	-5.1	17.7	1.5	151.5	6.8
Creams, gels, lotions and nail products	64.2	-1.4	35.3	-6.5	2.5	0.3	26.4	6.2
Nail varnishes	130.9	6.9	5.3	4.6	11.5	0.2	114.1	7.7
Solvents and other products	15.8	1.5	1.2	0.3	3.7	6.7	10.9	-

Data processed by Cosmetica Italia Statistics Dept.
 Values in million of Euros and change between 2022 and 2021.

Consumption of cosmetic products in 2022

(3 of 4)

	total		pharmacies		perfume shops		mass market	
	2022	change 22-21	2022	change 22-21	2022	change 22-21	2022	change 22-21
BODY CARE	1,370.9	9.0	471.2	7.3	115.5	8.0	784.2	10.2
Moisturisers, nutrients and exfoliant scrubs	212.7	-1.8	83.3	-4.6	23.0	2.4	106.4	-0.4
Multipurpose creams	82.9	4.0	53.2	6.1	5.4	2.3	24.3	-0.1
Body waters and oils	31.2	-1.1	20.5	-1.5	7.9	-0.2	2.8	-0.3
Anti-cellulite products	51.7	-4.6	33.1	-4.1	5.7	-8.4	12.8	-4.0
Firming agents, specific zone and anti-ageing	56.6	-6.0	25.4	-9.0	7.6	-6.6	23.6	-2.4
Deodorants and antiperspirants	474.4	12.9	64.5	7.5	12.4	12.8	397.5	13.9
Hair removers	59.4	0.6	2.0	2.3	4.7	-3.5	52.8	0.9
Sunscreens and pigmenting products	402.0	19.6	189.2	21.1	48.8	18.8	164.0	18.3
BODY HYGIENE	1,023.2	3.0	289.3	3.2	25.7	0.8	708.2	3.0
Soaps and syndets	94.0	-0.1	44.4	1.1	2.9	-5.0	46.7	-1.0
Liquid soaps	142.8	-5.9	16.4	-0.6	6.4	-3.5	120.0	-6.7
Bath and shower foams, salts, powders and oils	437.9	7.1	58.7	5.8	11.0	6.7	368.2	7.3
Talcs and powders	28.2	0.3	2.8	10.7	2.6	-3.1	22.8	-0.5
Products for foot hygiene	32.4	-1.5	16.9	-1.5	0.8	-2.5	14.7	-1.4
Products for intimate hygiene	287.9	3.7	150.1	3.6	2.0	-0.5	135.8	3.8
ORAL HYGIENE	667.1	3.5	146.3	5.7	4.2	-8.4	516.5	2.9
Toothpastes	476.3	3.8	61.4	0.5	3.6	-9.3	411.4	4.4
Mouthwashes, breath fresheners	190.8	2.7	85.0	9.9	0.7	-3.3	105.1	-2.4

Data processed by Cosmetica Italia Statistics Dept.
Values in million of Euros and change between 2022 and 2021.

Consumption of cosmetic products in 2022

(4 of 4)

	total		pharmacies		perfume shops		mass market	
	2022	change 22-21	2022	change 22-21	2022	change 22-21	2022	change 22-21
SKIN CLEANSING PRODUCTS FOR INFANTS	238.0	3.6	73.6	1.5	4.6	4.4	159.8	4.6
PRODUCTS FOR MEN	135.3	4.0	8.6	4.2	38.1	5.9	88.6	3.2
Soaps, shaving foams and gels	56.1	5.9	2.7	1.2	4.5	2.1	48.9	6.5
After shave products	45.9	2.4	2.8	1.3	12.0	6.8	31.1	0.8
Treatment creams	33.3	3.3	3.1	9.8	21.6	6.2	8.6	-5.2
ALCOHOL-BASED PERFUME PRODUCTS	1,223.4	16.3	22.0	13.4	961.0	20.4	240.4	2.3
Toilet waters and perfumes for women	760.1	16.9	19.2	12.8	615.3	20.7	125.6	1.7
Toilet waters and perfumes for men	463.3	15.2	2.8	17.2	345.7	20.0	114.8	2.9
GIFT PACKS	139.6	11.8	1.1	-0.2	124.3	13.2	14.2	1.9
Gift packs for women	74.9	12.3	0.7	-0.2	68.1	13.5	6.0	2.1
Gift packs for men	64.8	11.3	0.4	-0.3	56.1	12.9	8.2	1.8
TOTAL TRADITIONAL CHANNELS	8,987.1	8.4	1,951.4	4.6	2,216.8	18.1	4,818.9	6.0
DIRECT SALES	348.4	1.2						
E-COMMERCE	988.0	13.4						
HAI DRESSING SALONS	581.9	5.8						
HERBALIST STORES	378.1	0.5						
BEAUTY SALONS	221.6	5.1						
TOTAL ITALIAN COSMETICS MARKET	11,505.0	8.1						

Data processed by Cosmetica Italia Statistics Dept.
 Values in million of Euros and change between 2022 and 2021.



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