COSMETICA ITALIA
the personal care association

March 2025

COSMETICS BY NUMBERS

The preliminary figures relative to the Italian cosmetics industry at the end of the 2024 financial year are being published on the occasion of the 56th edition of the Cosmoprof.

In line with the advance information already contained in the conjunctural report published in February, statistics pertaining to the market and to the turnover achieved by Italian firms now confirm the industry's above-average trend as compared to the situation worldwide.

In the opening months of 2025, the global context is pervaded by a new increase in energy prices and by a deceleration in international commerce, while the protectionist measures adopted by leading markets seem, at the moment, to be exerting only a limited impact on trade. There is no doubt that the kind of strain that is now discernible between an open-door policy to commercial transactions and national autonomy emerges in periods of the most rapid transformation, such as the present day, and is driven by the increase in distances and in geopolitical tensions that are now at work. Despite the uncertainties that abound in the scenario, the Italian cosmetics industry's capacity to react is confirmed. It is primarily international markets that are responsible for facilitating this growth, together with the positive conditions of everyday habits practised by Italian consumers.

In fact, the industry closed the 2024 financial year with a turnover in excess of €16,500 million, up by 9.1% with respect to the previous year, while exports confirmed the industry's important dynamic potential, growing by 12.0% to surpass €7,900 million in value: Italy now ranks as the world's fourth cosmetics exporting country by export value after France, the United States and South Korea. The impact of this export trade on Italy's balance of trade was significant, touching the record level of €4,700 million in 2024 and accounting for no less than 17% of the entire European cosmetics trade balance.

In a context in which Italian manufacturing as a whole is feeling the effects of international demand, a crucial contribution is being made to the wealth of the entire national system by the combined efforts of the cosmetics industry's economic system (from the components upstream of manufacturing through to distribution), accounting for nearly 1.4% of Italy's GDP.

As far as the domestic market is concerned, across-the-board growth trends stand confirmed in all channels of distribution, affected marginally by inflation, bringing domestic consumption to a total value of €13,400 million.

Characteristic of the peripheral areas of this analysis are such phenomena as single-brand shops, specialised drugstores, e-commerce and the disintermediation that many firms are now practising in rationalising the passages in their distribution. For several years now, Italy's consumers have been moving towards premium-price and low-price segments, gradually eliminating the intermediate price ranges: this positioning reflects the fundamental role played by cosmetics in hygiene, bodycare, wellness, prevention and protection, as well in satisfaction and the sense of personal achievement.

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THE ITALIAN COSMETICS INDUSTRY TURNOVER

In 2024, the overall turnover of the Italian cosmetics industry, in other words the value of its total production, ended the year at about €16,550 million, an increase of 9.1% over the previous financial year. Sell-in values increased in all channels in Italy's domestic market, with important results being achieved in traditional channels.

Exports had a positive impact on the value of turnover, achieving a level of more than €7,920 million and a growth rate of 12.0%, registering an important confirmation in traditional markets, in particular the USA, and progress in new destinations.

Our prudence with regard to some evaluations and to medium-term estimates is suggested by the international economic scenario. This is aggravated by the geopolitical tensions currently at large, which have obviously also had an impact on the cosmetics industry value chain, with reflections that once again also intensify entrepreneurs' concerns about production costs and, as a consequence, their margins.

The changing international balance and the possibility that protectionist measures will be practised by the world's leading markets will certainly influence growth dynamics in the months to come. This could lead to a fallout on the Italian cosmetics industry's exports in the first quarter of 2025, even though, going against the trend of foreign manufacturing orders, 2024 performances hint at more than positive signals.

In the light of these considerations, in fact, forecasts for the 2025 cosmetics industry turnover currently estimate growth of 6.9%, confirming distinct dynamics between the sell-in that targets the domestic market and that generated by export flows.

Evolution of the Italian cosmetics industry turnover

	Value 2023	Preliminary 2024	Change % 24/23	Change % forecast 25/24
Turnover in Italy	**8,101**	**8,627**	**6.5%**	**5.4%**
of which generated in:				
Traditional & digital channels	*7,348*	*7,840*	*6.7%*	*5.5%*
Professional channels	*753*	*787*	*4.7%*	*4.1%*
Exports	**7,074**	**7,923**	**12.0%**	**8.5%**
Total turnover of Italian cosmetics industry	**15,175**	**16,550**	**9.1%**	**6.9%**
of which generated by contracts manufacturers	*1,975*	*2,137*	*8.2%*	*6.5%*

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

The Italian cosmetics industry reiterates its reputation in the world, highlighting and confirming the sector's strong points: investments in innovation, product quality and qualification, combined with staff training, all elements that will enable it to hold firm and maintain its competitive edge on markets.

Outsourcing in the cosmetics industry, which contributes to the total cosmetics industry turnover in Italy to the tune of 13%, closed the 2024 financial year with a turnover of nearly €2,140 million and a growth of 8.2% over the previous year. Estimates for 2025 indicate further growth, albeit with a degree of caution, amounting to some 6.5%: planning difficulties and the increase in costs of certain raw materials fundamental for the production of cosmetics, caused by the severe drought in 2023 and 2024, as well as the increase in transportation costs, both naval and aerial, also make their presence felt upstream of the industry chain.

IMPORTS AND EXPORTS

Italy's cosmetics exports increased in 2024 by 12.0% over the previous year, achieving a total value, in preliminary end-of-year records, of more than €7.900 million and confirming the industry's double-figure export growth rates, which are characteristic of the fundamental contribution to the increase in the cosmetics industry's total turnover in Italy.

The news is also positive with respect to the level of concentration in the top ten markets in value terms for Italian cosmetics exports, with the exception of Hong Kong, which together account for slightly more than 64% of the total, marginally redistributing the value going to markets other than consolidated commercial partners.

Top 10 of the Italian cosmetics exports

	Value 2024	Change % 24/23
United States	1,147	19.3%
France	797	13.0%
Germany	757	8.2%
Spain	534	24.6%
UK	399	7.4%
Poland	328	5.3%
Russia	311	70.3%
UAE	304	19.7%
The Netherlands	253	0.5%
Hong Kong	250	-0.2%

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

Going into detail now to look at individual countries, Italy's most faithful partners are once again paying attention to cosmetics Made in Italy: on their own, the Unites States (up by 19.3%), France (up by 15.0%) and Germany (up by 8,2%) absorb Italian cosmetics exports worth €2.700 million.

Yet the United States were not the only destination outside the European Union that marked up an increase in exports in double figures: a good performance also came from the United Kingdom (up by 7.4%) and double figures were achieved by the United Arab Emirates (up by 19.7%), analysing only the top ten markets for Italian cosmetics exports.

To go into more detail about product families, there was irregular growth, with more substantial performance in the category of alcohol-based perfumery, up by 26.3% compared to 2023, to a total value of more than €2,500 million. This was followed by the second category, that of skincare, which was up by 2.3% compared to 2023. The first two categories account for more than half of total Italian cosmetic exports, bringing in more than €4,200 million. Next in line in terms of their contribution to growth were haircare products, which increased by 8.4% to €1,500 million.

Composition of the Italian cosmetics exports by categories

	Value 2024	Change % 24/23
Fragrances	2,557	26.3%
Skin care	1,649	2.3%
Hair care	1,530	8.4%
Make-up	1,226	10.7%
Body hygiene	357	-3.7%
Oral hygiene	337	15.5%
Products for men	54	13.0%
Other cosmetics	212	1.7%
Total exports	**7,922**	**12.0%**

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

Imports also performed extremely well, driven above all by products for skincare (up by 10.7%) and alcohol-based perfume products (up by 25.7%). These two categories account for nearly two thirds of total Italian cosmetics imports. Alcohol-based perfume products and haircare products recorded the highest balances of trade compared to other cosmetic categories, at €1,600 million and €1,200 million respectively, thus accounting for 60% of the balance generated by Italian cosmetics industry trade and demonstrating the high degree of specialisation and competitive edge of cosmetic firms in world markets.

THE MARKET: DISTRIBUTION CHANNELS

At the end of 2024, the cosmetics market in Italy confirmed that the trend in Italians' cosmetics consumption cuts straight across all ranges of age and income, demonstrating the essential nature of the role played by cosmetics products in everyday perception. The alterations and accelerations experienced in sales of cosmetic products came from renewed buying and consumption habits that generated a value of nearly €13,400 million and a growth rate of 6.9% compared to the 2023 financial year. Despite the presence of economic and political factors of influence, which impact on the propensity to consume, estimates for 2025 can be projected with positive values, in excess of €14,100 million and up by 5.7%, as a result of Italian consumers' well-established habits.

In fact, the ritual nature of cosmetics consumption, accompanied by new experiential models in points of sale, improves consumers' brand commitment, as well as generating complete confidence in and identification with the values narrated by firms. Corporate storytelling has become a strategic tool that plays a crucial role in strengthening communications about such issues as sustainability, both environmental and social.

Value of the Italian cosmetics market by distribution channels

	Value 2023	Preliminary 2024	Change % 24/23	Change % Forecast 25/24
Mass market	5,217	5,507	5.6%	4.8%
Perfume shops	2,532	2,774	9.5%	6.6%
Pharmacies	2,098	2,218	5.7%	5.9%
E-Commerce	1,111	1,262	13.5%	10.0%
Herbalist shops	423	446	5.3%	5.0%
Direct sales	352	355	0.8%	1.0%
Hairdressing salons	589	618	5.0%	4.5%
Beauty salons	207	216	4.7%	4.3%
Italian cosmetics market	**12,530**	**13,396**	**6.9%**	**5.7%**

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

More specifically, sales of cosmetics through the **pharmacy** channel consolidated the current trend, increasing by 55.7% in 2024 over the previous financial year to a value of more than €2,200 million. Within this channel, products for skincare increased their market share in the course of 2025, achieving a total purchase value of €1,200 million (up by 6.6% compared to 2023), a performance that was in part driven by new items launched onto the market in a high price range. Projections for sales of cosmetics products in 2025 through the pharmacy channel estimate a further increase of some 5.9%.

Sales through the **herbalist shop** channel showed a positive trend for the 2024 financial year compared to 2023, achieving a total value of slightly more than €446 million (an increase of 5.3%) and returning to pre-Covid levels, assisted by the thrust introduced by the formulae of distribution organised in franchising arrangements. In terms of the channel's coverage, sales through herbalist shops accounted for 3.3% of total cosmetics consumption in Italy: the loss of the channel's market share, compared to its 4.1% before the pandemic started, is probably a consequence of the broader interest in sustainable and natural-origin cosmetics that is now found across several channels of distribution, harming the identity of the traditional formula of the herbalist shop, which has been suffering for years.

At the end of the 2024 financial year, the **perfume shop** channel confirmed one of the most dynamic increases among the traditional channels, growing by 9.5% compared to other traditional channels, with a strong contribution being made by fragrances, which alone account for 80% of the traffic in this channel. With a volume of sales in excess of €2,770 million, after almost ten years this channel has gone back to recording less marked divergences between sales by value and sales by volume, a situation that is probably generated by a stabilisation of the increase in list prices. Forecasts for 2025, now back in the terrain of organic growth, suggest an increase of 6.6%, to a market value likely to surpass €2,900 million.

Performing with a logic comparable to pharmacies, consumption purchased through **mass market retail** was more stable and continuous than other channels, up by 5.6%, to a total value of more than €5,500 million. Nevertheless, as already perceived in previous financial years, the great quantity of purchases that are moved through the mass market contains several different dynamic developments, resulting from buying choices that tend increasingly to shorten the times of reaction to external stimuli and expectations. The assortment and the price lever are among the leading drivers that accompany consumers' buying habits in this macro-channel, helping explain the successful performance of the specialist drugstore subsector (up by 7.2%), the leading channel in mass market retail, and of discount stores, up by 7.6%. In fact, the logic of consumers' propensity towards saving that accompanies scenarios of uncertainty leads them to prefer buying choices through this kind of channel, which has maintained sustained growth rates in recent years. In addition to this formula of distribution, an excellent performance was also recorded by single-brand stores, which broke through the barrier of €1,000 million of sales (an increase of 6.8%, compared to 2023).

Accounting for 2.7% of cosmetics consumed in Italy in 2024, **direct sales**, both on a door-to-door basis and via mail order, ended the year with less positive trends than other channels, mostly because demand has shifted towards other far more innovative forms of distribution. The channel nevertheless grew by a little under 1%, to a sales volume of slightly more than €350 million by the end of the year. In recent financial years, both the difficulties encountered by some businesses and the long periods of pandemic lockdown, which blocked the possibility of door-to-door distribution, have generated a constant deceleration in sales volumes, although there are signs of new dynamics among businesses that specialise in this channel.

The 2024 financial year brought the confirmation for **the e-commerce** channel of the integration between online and offline, as it is now securely rooted in Italian cosmetic consumer habits. Achieving a value in excess of €1,260 million, up by 13.5% over the previous year, online sales were in fact confirmed as the fourth channel of choice for cosmetics in Italy. The difficulties encountered in mapping the values of this phenomenon with accuracy are being compensated for increasingly as time moves on, as a result of the collaboration between the Study Centre and Human Highway and Witailer, which are fine-tuning the details of online sales. Forecasts for 2025 confirm double-figure rates of growth, applying strategic thinking to integrating online and offline brand efforts, each providing the other with reciprocal sales support.

Consumption through **beauty salons** increased by 4.7% in the 2024 financial year to a value of more than €216 million, accounting for 1.6% of total cosmetics consumption. This encouraging result follows on the contraction generated by the periods of closure in 2020. Against this background, there has been no reduction in the efforts to achieve innovation advanced by businesses, which are always alert to remodulation in distribution and to the new areas of treatments and wellness. They achieve this by paying due attention to new trends among consumers, who are increasingly demanding in terms of the quality of services, of those who provide them and of the settings where they are provided.

At the end of the 2024 financial year, the positive revival of consumption, both of services and of retail, was confirmed in **hairdressing salons**. A sustained growth rate 5.0% and a market value of €618 million saw consumption in this channel account for 4.6% of the total domestic cosmetics market, highlighting the dynamics practised by many professionals who have demonstrated the ability to behave proactively with regard the new situation of marketing, proposing segmentation strategies in both services and treatments.

THE MARKET: PRODUCTS

The analysis by product categories conducted by the Cosmetica Italia Study and Corporate Enterprise Centre contributes to a better understanding of the dynamics of consumption in Italian families, by cross-referencing data identified by various research institutes with historical databases and with the analyses derived from internal statistics that are subject to continuous updating for each sales channel. The trend in the last year describes the new orientations of consumption that have now taken root in the cosmetics market in Italy.

The performances of consumption by single product families are in fact transverse and well aligned, highlighting the market's good state of health, regardless of the individual consumer's socio-economic segmentation.

Face care

Products dedicated to skincare account for 16.2% of Italians' cosmetics consumption, constituting the primary product family, with consumption worth more than €1,700 million in 2024 and a substantial increase in purchasing, up by 5.7% over the previous year. as in the previous two years, there is a continuing trend in the excellent dynamics generated by product hybridisation involving the make-up sector, which can be read as part of the narrative of functionality claims more typical of skincare. 2024 brought an excellent across-the-board trend in pharmacies (up by 7.2%), in perfume shops (up by 4.8%) and in mass market distribution (up by 4.7%). If we now analyse the trends for individual products, we find good growth in cleansers and make-up removers for the face and eyes (up by 7.7% to a value of €206 million) and in moisturising and nutrient creams (which increased by 5.7% to a value of €295 million at the end of 2024). The sub-categories with greater value per weight, such as anti-ageing and anti-wrinkle creams, chalked up a positive growth rate of 5.8%, to a value of €739 million. This family of products was driven positively by pharmacies, which account for nearly 40% of all facial product consumption.

Body care

In 2024, the segment devoted to bodycare was the second largest family of consumption in the Italian population's habits, accounting for 15.2% of total sales and achieving a market value of €1,593 million, with a growth rate of 6.9% compared to 2023. A strong contribution was made to this variation by the increment of sun and pigmenting products, which sold for a value of €476 million, marking a growth of 8.2%, generated by the favourable evolution of the seasons. The negative trend continues in consumption of products for cellulitis (down by 6.7% to €44 million) and for firming, specific-zone and anti-body ageing products (down by 1.5% to €56 million). Continuing the trend that has held for the last three years, consumption of deodorants and antiperspirants expanded, growing by 9.2% to a value of €588 million. Mass market distribution, which accounts for more than 58% of this category's consumption, ended the year on a positive dynamic of 7.6% growth.

Fragrances

The performances of fragrances for both women and men, the third product family by size, were excellent in 2024, with respective growth rates of 11.2%, to €953 million, and 10.3%, to €572 million. The trend generated by consumption through perfumery shops was more than positive (up by 12.6%), while performances were scaled back in the more recent formulae of distribution, such as specialist drugstores, which had experienced better growth dynamic in recent years than the more traditional channels.

Personal hygiene

Products dedicated to body hygiene, which constitute the fourth largest family by value, registered a more modest growth rate than the other leading categories for the second year running, increasing by 4.1% compared to 2023: this trend in consumption applied across the board to many subcategories. The greatest contribution to the category's growth came from bath and shower gels, which were up by 4.7.% to a value of €494 million, while the shift in consumption away from liquid soaps (up by 0.6%) and towards bar soaps and syndets that offer solutions with pH values similar to those of the skin was consolidated: extensive use of hand gels and sanitisers has probably oriented consumer preferences towards alternative ways of cleansing and washing their hands.

Hair care

In addition to the products sold at retail and those used in hairdressing salons, this category also includes products for haircare and scalp care sold through other consumption channels. As was already the case in 2023, this latter category recorded a positive trend (increasing by 6.6%

to a value of €1,096 million), in line with the trend in the cosmetics market as a whole. In terms of value, products for haircare occupy the fifth place in the market, accounting for 10.4% of sales through traditional channels, more than three quarters of which are sold through the mass market distribution channel, approximately 18% through pharmacies and a marginal amount through perfume shops. Selling for a total of €511 million, shampoos closed the 2024 financial year with an increase of 6.1%. Similar growth was also experienced by conditioners, balsams and masks (up by 7.5% to €174 million). Although more marginal in terms of value, excellent growth trends were achieved by styling products such as fixatives and structuring mousses (up by 16.5%) and gels, waters and gums (up by 12%). While still positive, more modest growth was achieved by dyes and dye sprays (up by 4.3% to a value of €178 million), the second family of products by value, an indication of consumption oriented more towards professional salon services.

Make-up

Make-up products for the face, the eyes and the lips grew overall by 6.8% in 2024 compared to the previous year, achieving a value of more than €1,800 million. The trend was vigorously positive for lip products, whose sales increased by 8.8% to nearly €511 million, and for face products, up by 7.0% to nearly €690 million. Growth was more moderate for products related to eye make-up, a category that suffered less from the effects of the Covid pandemic, which increased by 5.0% to a total of €619 million. Mass market distribution accounted for more than 60% of make-up product sales, while slightly less than 30% of consumption can be attributed to perfume shops. Despite being marginal in terms of value, the dynamics of growth in face and lip make-up sales (up respectively by 9.2% and by 14.7%) through the pharmacy channel are of some significance.

Natural derived and sustainable cosmetics

By the end of 2024, purchases of cosmetics with a natural and sustainable character had achieved a value of €3,316 million in Italy, indicating an increase of 6.5% compared to the previous year and accounting for 24.8% of the cosmetics market as a whole.

Although these products were first offered through specialised channels, in particular that of herbalist shops, which remained the preferred go-to channel for their sales for many years, they have now also expanded into other specialised sales channels, reflecting the changes in consumers' buying habits. The most significant feature of this development is the way that two fields overlap (the dynamics of this overlap alone grew by 24.2% last year), from a purely marketing perspective witnessing interaction between the area of cosmetics with a natural and biological character (up by 5.8% compared to the previous year) and those identifiable with environmental sustainability (up by 7.0% compared to 2023).

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Data processed by Cosmetica Italia Statistics Dept. Values in million Euros and change from previous period.	TOTAL		Pharmacies		Perfume shops		Mass market	
	2024	change % 24-23	2024	change % 24-23	2024	change % 24-23	2024	change % 24-23
HAIR AND SCALP CARE	**1.096,1**	**6,6**	**200,1**	**4,5**	**50,3**	**14,3**	**845,7**	**6,7**
Shampoos	510,8	6,1	109,8	5,8	13,2	12,3	387,8	6,0
Lotions and shock treatments	73,4	6,2	52,2	4,5	11,0	22,0	10,2	0,5
Dyes and coloured mousses	178,2	4,3	25,7	-3,1	10,0	7,1	142,4	5,6
Lacquers	71,9	6,2	0,2	-4,5	4,0	21,8	67,7	5,4
Post-shampoo treatments, balsams and masks	173,6	7,5	11,7	11,5	7,9	14,3	154,0	6,9
Fixers and structuring mousses	35,7	16,5	0,1	-2,4	2,2	6,4	33,4	17,2
Gels, waters and gums	52,6	12,0	0,4	-6,4	2,1	22,4	50,1	11,8
PRODUCTS FOR FACE CARE	**1.704,2**	**5,7**	**675,7**	**7,2**	**525,8**	**4,8**	**502,7**	**4,7**
Face and eye detergents and make-up removers	206,0	7,7	69,0	8,7	47,5	1,8	89,4	10,2
Facial tissues	48,1	-4,5	3,9	4,6	7,9	3,5	36,4	-6,9
Toning lotions	45,6	9,5	7,2	10,2	22,8	11,0	15,6	7,1
Periocular area and specific zones	175,8	4,0	63,6	4,3	77,8	2,3	34,4	7,4
Moisturising and nutrient creams	295,1	5,7	119,7	4,9	71,0	3,5	104,4	8,3
Anti-ageing and anti-wrinkle creams	738,9	5,8	301,7	7,4	264,8	6,5	172,5	2,2
Masks and exfoliant scrubs	86,1	2,6	18,0	5,1	23,5	1,0	44,6	2,5
Products for skin impurities	78,4	10,3	66,1	10,4	9,2	2,2	3,1	40,4
Depigmenting products	30,1	10,0	26,4	12,1	1,3	1,5	2,3	-5,0
PRODUCTS FOR FACIAL MAKE-UP	**689,1**	**7,0**	**54,1**	**9,2**	**253,0**	**9,9**	**382,1**	**4,8**
Foundations and coloured creams	334,6	5,9	32,6	12,1	113,8	8,9	188,2	3,2
Face powder	81,2	5,3	3,9	0,5	28,3	5,7	49,1	5,5
Cheek correctors, blushes and clays	273,3	8,8	17,6	6,0	111,0	12,1	144,8	6,7
MAKE-UP PACKS	**60,8**	**9,2**	**0,2**	**3,4**	**43,3**	**10,5**	**17,3**	**6,2**
PRODUCTS FOR EYE MAKE-UP	**618,7**	**5,0**	**36,9**	**2,3**	**158,6**	**5,2**	**423,3**	**5,2**
Shadows	137,7	5,7	3,8	2,8	29,1	3,3	104,7	6,4
Mascaras	249,5	5,2	19,9	2,3	74,9	5,1	154,7	5,6
Liners and pencils	231,6	4,4	13,2	2,1	54,6	6,4	163,8	4,0
PRODUCTS FOR LIP CARE	**511,0**	**8,8**	**88,4**	**14,7**	**115,4**	**11,0**	**307,2**	**6,4**
Lipsticks and lip glosses	336,7	7,6	19,9	11,2	87,3	9,2	229,5	6,7
Liners and pencils	64,3	8,8	2,8	4,5	21,7	18,3	39,7	4,6
Protections, colourless foundations and sun sticks	110,0	12,6	65,7	16,3	6,5	13,6	37,9	6,6
PRODUCTS FOR HAND CARE	**225,4**	**2,8**	**41,8**	**-2,5**	**17,4**	**3,3**	**166,2**	**4,2**
Creams, gels, lotions and nail products	67,3	1,3	35,5	-1,7	2,5	2,7	29,3	5,0
Nail varnishes	143,1	4,3	5,1	-7,5	11,2	3,9	126,8	4,9
Solvents and other products	15,0	-3,7	1,1	-3,6	3,7	1,8	10,1	-5,6
PRODUCTS FOR BODY CARE	**1.592,8**	**6,9**	**530,3**	**5,9**	**135,4**	**5,7**	**927,2**	**7,6**
Moisturisers, nutrients and exfoliant scrubs	240,4	5,8	90,2	3,1	27,7	11,2	122,5	6,6
Multipurpose creams	92,9	5,1	58,9	4,5	6,3	6,7	27,7	5,9
Body waters and oils	33,5	2,7	23,1	4,4	7,8	0,1	2,6	-4,1
Anti-cellulite products	43,8	-6,7	27,9	-5,9	3,9	-16,2	12,0	-4,9
Firming agents and anti-ageing products	56,0	-1,5	23,5	-3,3	8,3	-6,2	24,1	2,2
Deodorants and antiperspirants	587,9	9,2	74,7	7,9	13,5	1,9	499,8	9,6
Hair removers	62,3	3,9	1,9	2,0	5,4	13,7	54,9	3,1
Sunscreens and pigmenting products	476,1	8,2	230,1	9,7	62,3	7,8	183,6	6,6
PRODUCTS FOR BODY HYGIENE	**1.125,7**	**4,1**	**310,8**	**3,3**	**23,0**	**-1,2**	**791,9**	**4,5**
Soaps and syndets	105,4	2,6	47,5	1,1	2,3	0,3	55,6	3,9
Liquid soaps	144,3	0,6	17,9	5,6	5,4	0,7	121,0	-0,1
Bath and shower foams, salts, powders and oils	494,0	4,7	62,4	3,1	10,4	-1,1	421,2	5,1
Talcs and powders	30,1	3,5	3,1	9,0	2,5	-2,0	24,4	3,4
Products for foot hygiene	32,4	0,4	17,4	0,7	0,8	-4,1	14,3	0,2
Products for intimate hygiene	320,6	5,8	162,5	4,0	1,6	-6,4	156,5	7,9
PRODUCTS FOR ORAL HYGIENE	**784,2**	**7,1**	**167,3**	**5,8**	**4,2**	**1,4**	**612,7**	**7,4**
Toothpastes	571,3	8,2	70,8	8,2	3,5	1,5	497,0	8,2
Mouthwashes, breath fresheners	212,9	4,2	96,5	4,1	0,7	1,1	115,8	4,3
SKIN CLEANSING PRODUCTS FOR INFANTS	**238,1**	**-1,6**	**72,5**	**-2,9**	**4,7**	**1,4**	**161,0**	**-1,1**
PRODUCTS FOR MEN	**145,4**	**2,7**	**9,5**	**7,4**	**42,4**	**4,0**	**93,5**	**1,6**
Soaps, shaving foams and gels	59,5	1,8	2,9	4,5	4,7	0,6	51,9	1,8
After shave products	47,6	1,7	3,2	8,4	12,5	3,0	32,0	0,5
Treatment creams	38,3	5,4	3,5	9,1	25,2	5,2	9,6	4,6
ALCOHOL-BASED PERFUME PRODUCTS	**1.524,6**	**10,9**	**29,3**	**13,6**	**1.233,4**	**12,6**	**261,8**	**2,9**
Toilet waters and perfumes for women	952,9	11,2	25,7	13,7	791,2	12,9	136,0	1,8
Toilet waters and perfumes for men	571,7	10,3	3,7	13,0	442,2	12,2	125,8	4,0
GIFT PACKS	**182,6**	**10,3**	**1,2**	**1,0**	**166,7**	**11,2**	**14,7**	**1,4**
Gift packs for women	98,7	10,7	0,8	1,1	91,7	11,5	6,2	1,3
Gift packs for men	83,9	9,8	0,4	0,9	75,0	10,9	8,5	1,5
TOTAL TRADITIONAL CHANNELS	**10.498,8**	**6,6**	**2.218,0**	**5,7**	**2.773,6**	**9,5**	**5.507,1**	**5,6**
E-COMMERCE	1.261,5	13,5						
HERBALIST STORES	445,9	5,3						
DIRECT SALES	355,0	0,8						
HAIRDRESSING SALONS	618,1	5,0						
BEAUTY SALONS	216,3	4,7						
TOTAL ITALIAN COSMETICS MARKET	**13.395,6**	**6,9**						

METHODOLOGY

*When investigating the value of production, i.e. of the **total turnover** achieved by cosmetics industry, the Statistics Department bases its calculations on the panels drawn up by the Italian national institute of statistics – ISTAT, but above all on the collection and elaboration of the financial reports issued by companies.*

The constant refinement of these bases has led to a substantial increase in the values of turnovers, which is re-elaborated with respect to previous years, to ensure that the final statistics are comparable on a year-by-year basis.

*With regard to the values of **markets**, **distribution** and **products**, the Statistics Department analyses and elaborates data based on the categories of Cosmetica Italia, completing them with detections from Nielsen IQ, Circana, New Line, MeTMi, Human Highway and other data monitors and combining the databases with the benchmarks defined with the firms belonging to the respective groups. The Statistics Department than elaborates the final data, allowing for comparison of historical basis and proceeds to check the adequacy of trends in the light of changes in distribution channels. These checks, of a qualitative orientation nature, are carried out through interviews and discussions with the industry's more highly specialised operators.*

To guarantee the reliability of the data collected and elaborated, a tool has been developed for measuring the variations expressed in the preliminary results provided in "Cosmetics by Numbers" and their comparison with the percentage variations calculated in the final reports.

*The resulting index, as an output from the Statistics Department, is an element that is taken into consideration in the checks run by the Certiquality experts, who double-check for compliance with quality procedures. In this regard, attention is called to the fact that Cosmetica Italia and Cosmetica Italia Servizi have received the confirmation of **UNI EN ISO 9001:2015** and **14001: 2015 certification**.*