Beauty and Personal Care in Italy

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture
Italian consumers prioritise gratification in beauty and price in personal care
Competitive landscape
Retailing developments
What next for beauty and personal care?

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DISCLAIMER

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Baby and Child-Specific Products in Italy

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2023 DEVELOPMENTS

Strong price increases impact volume sales but the end of pandemic restrictions provides a boost to demand
Focus on protection and a longer summer boosts sales of baby and child-specific sun care
Sustainable and natural products continue to see growing demand while skin hydration becomes a growing claim

PROSPECTS AND OPPORTUNITIES

Falling birth rates present a significant threat to the future of baby and child-specific products
E-commerce and drugstores set to gain share, as other channels limit their offerings in the category
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Bath and Shower in Italy
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2023 DEVELOPMENTS

Category-wide price hikes bolster value growth in 2023 but place downward pressure on volume sales
Surge in demand for skin-friendly solutions favours bar soap over liquid variants
Companies adjust pack sizes to attract budget conscious shoppers

PROSPECTS AND OPPORTUNITIES

Bath and shower sales to normalise following the pandemic and cost of living crisis
Positive outlook for private label as Italians show a growing interest in value over branding
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Colour Cosmetics in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Colour cosmetics sees strong growth as consumers return to busier lives away from the home
Lip products and facial make-up show steady growth during the first mask-free year
Cosnova continues to strengthen its share in Italy thanks to its offer of affordable quality

PROSPECTS AND OPPORTUNITIES

Volume sales to return to pre-pandemic levels in the short term while fashion brands should bring renewed energy to the premium segment
Multipurpose products set to gain further share as consumers look for value and convenience
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Deodorants in Italy

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Strong price hikes and favourable weather boost demand for deodorants
High demand for convenient deodorant formats with sprays coming out on top
Leading brands focus on product performance to attract consumers

PROSPECTS AND OPPORTUNITIES
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Sustainable and natural deodorants likely to gain traction
Innovation set to be focused on added benefits and skin-friendly solutions

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Consumers go in search of value as the cost of living rises, while Sodalco launches a new product range to attract demand
Depilsoap brand revamped by new ownership

PROSPECTS AND OPPORTUNITIES
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KEY DATA FINDINGS
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Fragrances thriving as consumers look for small indulgences
Consumers favour premium fragrances
Brand launches focus on more intense fragrances to meet consumer demand

PROSPECTS AND OPPORTUNITIES
Fragrances will likely continue to be associated with emotional wellbeing
Luxury fashion brands set to strengthen their position in fragrances
Clean, natural and sustainable products set to drive innovation in fragrances

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Hair Care in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price hikes boost value growth in 2023 but negatively impact volume sales
New product launches target growing skinification trend
L’Oréal remains the biggest company in hair care but Pantene remains the leading brand thanks to strong investment in new product development

PROSPECTS AND OPPORTUNITIES

Hair care set to see moderate volume growth in the forecast period
Styling agents and colourants likely to struggle for growth
Sustainability concerns set to drive new product development and innovation over the forecast period

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Men’s Grooming in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men’s grooming continues to see volume growth in 2023 despite price hikes
Favourable weather and more active lifestyles support toiletries’ sales
The growing number of bearded Italians casts a cloud over men’s shaving

PROSPECTS AND OPPORTUNITIES

Men’s grooming set to benefit from the performance of men’s fragrances and men’s toiletries
Health and beauty-focused men set to drive demand for premium men’s grooming products
Men’s shaving expected to continue struggling, while beard care products could see growing interest
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Key Data Findings

2023 Developments
Oral care shows strong value growth on the back of high price increases
Sales of electric toothbrushes continue to be impacted by challenging economic conditions
Health-focused consumers prioritise quality in toothpaste and price in other categories

Prospects and Opportunities
Improving oral care routines set to drive volume growth in the coming years
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Skin Care in Italy

Key Data Findings

2023 Developments
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The official end of the pandemic has a mixed impact on sales in 2023
Body care continues to struggle as consumers shy-away from the category

Prospects and Opportunities
Positive outlook for skin care but challenges remain
Efficacy and sustainable claims set to drive skin care innovation
Beauty specialists set to grow at the expense of pharmacies
KEY DATA FINDINGS

2023 DEVELOPMENTS
Sun care sales see healthy growth in 2023 despite a slow start to the season
Sun protection drives sales as consumers increasingly view these products as essential
Private label sun care continues to outperform branded offerings due to cost-of-living crisis

PROSPECTS AND OPPORTUNITIES
Sun care will continue to benefit from tourism and climate change
Year-round sun protection expected to sustain category sales and drive innovation
Sun care set to become increasingly environmentally friendly

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Premium Beauty and Personal Care in Italy

KEY DATA FINDINGS

2023 DEVELOPMENTS
Premium beauty and personal care shows a solid performance as consumers allow themselves small indulgences
Luxury fashion brands enter the premium beauty market
La Roche-Posay becomes the leading premium beauty and personal care brand

PROSPECTS AND OPPORTUNITIES
Premium offerings set to grow in coming years favoured by economic recovery
Men showing a growing willingness to invest in their appearance
Beauty specialists poised for growth as they look to offer greater value and new experiences

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2023 DEVELOPMENTS
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Drugstores and beauty specialists benefit from a wide offer and expert advice
Companies play with pack sizes in a bid to attract value-focused consumers

PROSPECTS AND OPPORTUNITIES
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Optimistic outlook for private label
Sustainability and performance set to be main focus of innovation

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