

## COSMETICS BY NUMBERS

### INTRODUCTION

The traditional examination of the preliminary data for the cosmetics industry during the last financial year is set to take place at Cosmoprof in Bologna, from 16 to 20 March 2017; the definitive data will be presented on the occasion of the Cosmetica Italia Board Meeting, which is due to be held on 28 June 2017. The closing values for 2016 show a smaller degree of growth than that demonstrated by trends in 2015, with domestic consumption of cosmetics worth around 9,900 million euro, an increase of 0.5%; these figures exceed the pre-crisis values, serving to confirm the anti-cyclical nature of the market and its indifference to negative economic conditions.

The evolution of both new sales channels and traditional channels continues, prompted by new consumer tendencies, with buyers looking to find a balance between their financial resources and the need to take care of themselves. Whilst awaiting confirmation of a shift into a period of growth for the market, consumers are remaining loyal to more economical price categories and channels, as well as continuing to purchase premium products, leading to the marginalisation of the mid-price range. In recent years, this has had a significant impact on the decline in volumes, which has been offset by the high number of new launches.

Demonstrating the resilience that has tended to characterise their market strategies, Italian companies are taking advantage of these continued positive trends, particularly in the area of cosmetics exports, with results for 2016 approaching 4,300 million euro (+ 12.3%), which not only makes it easier for Italian companies in the sector to maintain their turnover, but also increases this, in sync with the gradually recovering domestic market. Indeed, production values have grown by five percentage points, pushing the total to 10,500 million euro and further confirming the strengthening of the cosmetics sector.

The cosmetics industry, which continues to focus on investment in innovation and on the qualification of production capacities, has demonstrated greater strength than other sectors within the *Made in Italy* system in terms of the balance sheet too, and has confirmed that the new project designed to analyse the budgets proposed recently will be going ahead. The financial and operational values in particular have been highlighted, and in general terms, these enable the sector to face a political and economic scenario which remains very uncertain.

### Evolution

#### The cosmetics industry

(millions euro)

<i>figures in million euro</i>	<i>final figures 2015</i>	<i>variation % 2015/14</i>	<i>final figures 2016</i>	<i>variation % 2016/15</i>	<i>forecasts % 2017/16</i>
<b>Turnover Italy (sell-in)</b>	<b>6,164</b>	<b>1.5</b>	<b>6,209</b>	<b>0.7</b>	<b>1.3</b>
Traditional channels	5,504	1.8	5,540	0.7	1.3
Professional channels	661	-2.4	669	1.3	1.5
<b>Exports</b>	<b>3,807</b>	<b>14.3</b>	<b>4,275</b>	<b>12.3</b>	<b>8.0</b>
<b>Global turnover</b>	<b>9,971</b>	<b>6.0</b>	<b>10,484</b>	<b>5.1</b>	<b>4.0</b>

## THE MARKET: CHANNELS

As demonstrated by the recent updates to the analyses which focus first and foremost on online sales and specialist channels, the consumption value for cosmetics in Italy in 2016 exceeded 9,900 million euro, an increase on the previous year of 0.5%. A satisfactory result, then, particularly considering the effects that the global crisis in the Autumn of 2008 has continued to have on purchasing propensity, with a significant influence on Italian consumers in the subsequent period. The consumption of cosmetics in Italy has been seen as essential for some time, and is behind the fact that the negative economic trends of recent years along with new consumption patterns have created new channels and new purchase options, widening the gap between premium and more affordable products, although we have recently witnessed a decline in volumes, in favour of an increase in values.

Sales of cosmetics in the **pharmacy** channel have been declining since the summer of 2016. These values must be monitored with a view to understanding the nature of this decline: namely whether it is episodic or structural. Sales remain higher than the 1,800 million euro mark, with a negative index of -0.1%. The cosmetics sold in this channel represent 18.5% of the total volume, a proportion that has been growing steadily in the recent past, proving that consumers place a great deal of trust in pharmacies as sales outlets, relying on the degree of specialisation and service they receive here - far superior to other distribution points. Results are better than those in other sales channels, as pharmacies strengthen their investment in cosmetic products and in specialist training for sales teams, and indeed, this is reinforced by the impact of promotions and offers, in addition to an increasingly close relationship between companies and pharmacists, who are working together to invest in the identity of the pharmacy and its position within the market, as well as turning their focus to customers.

Cosmetics sold in **herbalist stores** in 2016 also confirm the positive trend of recent years, although a slowdown in growth rates is evident with respect to the figures seen a few years back. At over 430 million euro and with a growth of slightly more than one percentage point, the value of sales serves to confirm the staying power of this channel, which represents 4.4% of total consumption in Italy, thanks above all to the sales made by companies that own specialist single-brand products, against a backdrop of non-performing loans in the traditional herbalist store channel. While it is true that more and more consumers are expressing an interest in the world of "natural and green" products, and are increasingly devoted to "naturally-derived cosmetics", it is also true that attention is distributed across other channels too, where the range of "green" products on offer is growing.

In recent years, after a significant decline in market values, we have seen a slight recovery in terms of the consumption of cosmetics in **perfume shops**, as confirmed by the figures for the end of 2016, which show a sales value of 0.9%, which amounts to 2,018 million euro, 20.4% of the total consumption in Italy. The decline in volumes compared to the figures remains clearly evident. Despite support actions such as new launches, stock reduction and dynamic pricing policies, some independent retail outlets are still in difficulty. Indeed, the dichotomy between the static nature of many traditional or neighbourhood perfume shops and the dynamics of success which characterise both chain stores and small distribution companies is still evident - the latter have succeeded in capitalising on the concept of niche, exclusive products, new distribution strategies and new investments which emphasise the selective nature of the channel.

In line with the trends seen in the last few years, **mass market** sales which cover more than 41% of the national cosmetics market have suffered a minor decline of around -1.0%, with a value approaching 4,054 million euro in 2016. In 2016 again, companies working within this channel have made significant investments in products in this category, and have attempted to optimise price positioning. The profound transformation of strategies designed to adapt to the new purchasing options available continues, giving rise to uneven trends across the various types of distribution outlets. The major gap between sales of cosmetics in hypermarkets and in traditional supermarkets has narrowed, dropping by more than 3.5 percentage points, while sales in specialist areas, which are also referred to as "the home and personal care sector" have recorded a growth of nearly 2%, due to the fact that new opportunities have recently opened up in Italy. The growth and the dynamic impact of new single-brand stores has also continued, with an increase of 2.9%.

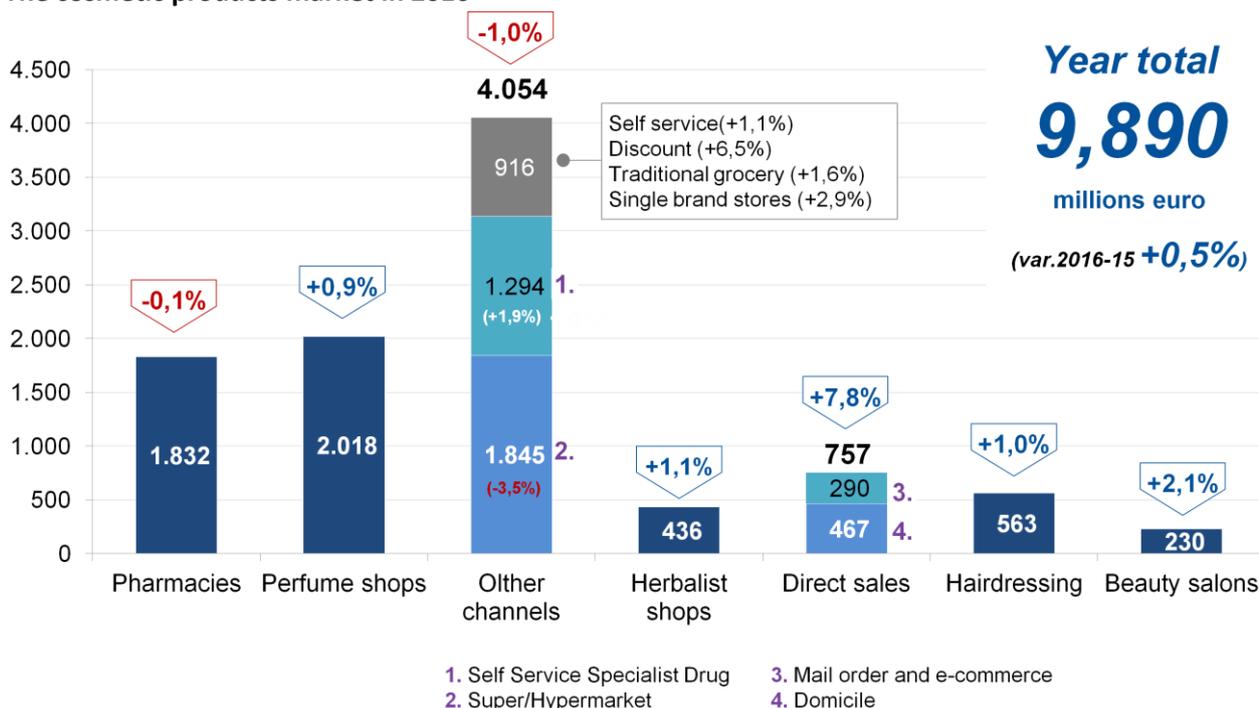
In 2016, **direct sales** (either door-to-door-sales or mail-order), which account for more than 7.7% of total cosmetics consumption throughout the year, continue to score more positive trends than other channels, mainly due to the impact of online sales: indeed, the growth figures have reached eight percentage points, with a sales volume of more than 750 million euro at year-end. During the crisis years, door-to-door-sales in particular proved to be most able to meet the changing consumption requirements compared to traditional channels, helped by new sales techniques and digital communications, which are becoming increasingly fundamental. The success of this channel is also due to the fact that it offers more accessible price lists and commercial terms, as well as a highly effective launch policy and new collections. Lately, however, we have been witnessing a slowdown in sales volumes, in part due to the difficulties encountered by various operators in this channel. But in recent years, online sales have been the real phenomenon - indeed, the results have been revised and adjusted to place this channel at the top in terms of statistics, with strong growth, to the tune of around 230 million euro at the end of 2016.

The consumption of cosmetics within the **professional channels** is also enjoying a recovery. Indeed, last year, we saw an increase in visits to these sales outlets, and a corresponding growth in consumption, largely courtesy of an overhaul of the products on offer in salons in addition to new forms of well-being services, taking the value of this channel to just over 790 million euro, around 8% of total consumption. The results for 2016 demonstrate that the negative economic situation is still exerting more of an effect on beauty and hairdressing salons than on traditional channels, with salons receiving fewer clients and consumption shifting to alternative channels such as do-it-yourself and substitute products, with a clear reduction not only in the sales of cosmetics linked to the actual salon service but also in retail products. In recent months, however, the trend seems to have come to a halt.

In **beauty salons**, consumption has begun to recover, increasing by 2.1%, for a value of 230 million euro. This channel has suffered more than the rest from an inability to redesign their identity, which, in the eyes of consumers, is increasingly geared towards the qualification of the service, of those who practice it and of the environment in which these services are delivered: these are the areas on which companies have focused their recovery efforts.

Equally positive are the consumption trends recorded in **hairdressing salons**, with a growth of 1% and a value of 563 million euro: the general decrease in visits to salons had been having a negative effect on the industry for more than five years, despite the fact that many professionals had reacted by proposing strategies to separate the services and treatments offered.

### The cosmetic products market in 2016



## **THE MARKET: PRODUCTS**

As is the case every year, the Statistics and Business Culture departments of Cosmetica Italia have carried out a detailed analysis of consumption by product family and their relative subgroups, cross-checking the data obtained from various research institutes with the existing databases and the analyses derived from internal statistics, which are constantly updated for each sales channel.

There have been signs of change within the channels, as a result of the different approach to in-store experiences that is increasingly being taken by consumers, as well as the different purchase drivers/inhibitors, which are leading the industry to show greater dedication in terms of quality, perceived service and innovation.

The natural connotations of the products on offer, a hybrid approach in terms of both categories and channels and the increase in digital communications are the new conditions that are having an impact on corporate strategies designed to deal with the different consumption dynamics for each product category.

### **PRODUCTS FOR BODY CARE**

In 2016, the body care segment was still the main consumption group in terms of Italian purchasing habits, covering 16.6% of total sales for a value of 1,383 million euro, despite a drop of around two percentage points from the figures seen in 2015. This decline is seen within the various product subcategories, above all in anti-cellulite products (50 million euro) and firming products (34 million euro), which fell by 7.1% and 6.3% respectively.

Continuing this negative trend were deodorants with a value of 59 million euro (-2.9%), with a marginal decline in terms of value weighting in body waters and oils (17 million euro, down 2.0%) and hair removers, at 2.8 million euro (-4.2%).

Also of significance in terms of value (but with a less negative impact on the trend for the product family as a whole) are sunscreens and pigmenting products, which have suffered a decline of 0.5 % after a strong growth in 2015, taking the value of this subcategory to 158 million euro. This category is followed by moisturisers, nutrients and exfoliant scrubs, with a value of almost 87 million euro, down 0.9%. The only subcategory to achieve positive results is that dedicated to multipurpose creams, which, with a value of just over 39 million euro, has enjoyed a growth of 1.6%.

### **PRODUCTS FOR FACE CARE**

Products dedicated to skincare represent nearly 16% of the total consumption of Italian cosmetics, with a value of 1,314 million euro, up by just over one percentage point for the last financial year, as was the case in 2015. 2016 was a year characterised by positive trends in the perfume shop and pharmacy channel, whilst in mass market outlets, sales fell significantly.

On analysing the performance of individual products, however, a general contraction across multiple subcategories is evident, compensated by the growth of anti-aging and anti-wrinkle creams, with a value of 587 million euro (+ 2.6%) and exfoliating masks, valued at over 43 million euro, with a growth of more than 18 percentage points. Perfume shops have succeeded in pulling the results for this product family up too, with more than 30% of consumption concentrated on facial care products.

### **PRODUCTS FOR HAIR CARE**

In addition to retail products and those used in salons, the figures for hair and scalp care products sold in consumer channels have also declined as was the case during the previous year, with a 4.1% decrease and a new value of just over 1,063 million euro for 2016.

In terms of value, the above occupy third place in this product family, representing 12.7% of sales in traditional channels, two-thirds of which are in mass market outlets, 17% in pharmacies and 4% in perfume shops.

Shampoos, with sales worth 470 million euro, closed the year down by three percentage points too; a decline also seen in other subcategories such as post-shampoo treatments, balsams and masks (-4.0% with a value of 141 million euro), while dyes and coloured mousses – the second product family in terms of value in the category – closed the year 218 million euro above quota, with a decline of 5.6%.

### **PERSONAL CLEANSING**

Following the recovery seen in 2015, the family of products dedicated to personal hygiene and similar product types has suffered another loss, falling a little more than one percentage point, with a sales value of around 1,102 million euro. Shower and bath liquids, salts, powders and oils also recorded a decline across the board (- 1.5%), with a value of more than 440 million euro, while liquid soaps were also down - 4.7%, just over 110 million euro.

### **ALCOHOL-BASED PERFUME PRODUCTS**

Sales of male and female fragrances grew in 2016 by 2.2% and 2.4% respectively, bringing the value of this product family to more than 1,064 million euro. The new dynamics demonstrated by the leading sales channel, perfume shops, were crucial, leading to a growth of 1.4%, and the distribution policies pursued by specialised chains proved to be equally significant, with the latter selling more than 140 million euro worth of product, + 5.5% compared to 2015.

### **MAKE-UP**

In 2016, make-up products have demonstrated a positive trend, maintaining the positive performance of this category over the last four years, thanks mainly to the mass presence of single-brand distribution points and corners. The face make-up subcategory did well (+ 4.5%), whilst make-up packs went up by 2.0% and eye make-up by 0.7%. Lip make-up made an excellent recovery too (+6.8%), while products for hand care suffered a decline, with the exception of creams, gels and lotions for nails.

### **COMPARISON OF TRENDS**

The analysis of trends - both positive and negative - across product families and individual products allows us to highlight the most obvious phenomena in terms of the data gathered for 2016. The most significant developments in terms of growth were seen in the lipstick and lip glosses subcategory (+ 8.5%), along with that pertaining to sales of foundations and coloured creams (+5.0%), and, in lesser terms with regard to value, of liners and pencils (+5.0%). Negative trends were seen across the board for haircare products, particularly for shampoos (-3.0%) and dyes and coloured mousses, with a decrease of 5.6%. Deodorants and antiperspirants also ended the year with a negative result (-2.9%)

The redistribution of purchasing options and consumer habits undoubtedly had a major effect on these trends, once again demonstrating a focus on the service provided at beauty and hairdressing salons, due to the value that skilled operators in this area have succeeded in passing on to consumers.

### **TURNOVER OF THE ITALIAN COSMETICS INDUSTRY**

In 2016, the global turnover for the cosmetics industry - or in other words, the value of production - exceeded 10,500 million euro, with an increase of 5 percentage points. The turnover of companies, in light of the domestic demand which remains somewhat subdued, has benefited from strong signs of recovery across professional channels. However, foreign demand remains the key component to enabling the growth of production values for 2016: indeed, an increase of more than 12% was recorded for exports, for

a value close to 4,300 million euro. The balance of payments has also improved significantly, reaching the 2,300 million euro mark thanks to the growth in imports - an absolute record for the sector. In terms of sell-in sales in the domestic market, with regard to outlet channels, as anticipated, the performance of **professional channels** has had a positive impact; although the growth trend has slowed, after the sharpest decline recorded in 2013 (-7.7%), with a sell-in value of 670 million euro: as such, the expected decrease in those visiting beauty centres and hairdressing salons now slowed, with signs that it is effectively evolving and changing its offering in recent years. The forecast for next year, although improving, are still beset by tension with regard to salons that have been less speedy in reacting to new patterns of consumption. The turnover of businesses investing in **traditional channels** has grown slightly (+0.7%), with a production value of nearly 5,550 million euro. In line with the constant reshaping of consumption, even within channels, direct sales and sales in some specialist mass market areas have responded to changes in consumer behaviour with a trend which demonstrates a major recovery. Certainly the new situation with regard to online sales and the development of specialised mass market retailers is having a marked effect on the recovery of the Italian market, despite the sluggish trends still in evidence for large retail outlets and in some other sales points, such as traditional herbalist stores. At international level, a general recovery can now be observed, in the wake of a climate of generalised uncertainty and mistrust which affected the markets especially in the 2012-2013 period. This has led to the significant results for Italian cosmetic exports in 2016, often more dynamic than the growth in consumption in other export countries, with the obvious gains in penetration quotas. The Italian cosmetics industry has confirmed its reputation worldwide for innovative formulations and for the dynamic service offered by its manufacturers. It is these characteristics that have enabled this *Italian industry* to make a name for itself on both traditional and emerging markets.

For several years now, the Statistics Dept. been carrying out a yearly analysis which has been extended to cover the cosmetics industry as a whole, with a view to proposing a dynamic and rational overview (with the necessary adjustments) of the phenomena which affect the chain at various levels, both upstream and downstream. From cosmetic ingredients to production machinery, packaging and the finished product, this analysis therefore provides a snapshot of the "long" supply chain of the Italian cosmetics industry. Not forgetting that some of the data is still provisional, the total industry turnover has exceeded the 14,000 million euro mark in 2016, showing a recovery of more than five percentage points, which has been further reinforced by forecasts for 2017. The year is expected to close positively, with growth of around 4.5%.

From raw materials, which recorded a turnover of approximately 950 million euro, to machinery, with around 220 million and packaging, approaching the 3,300 million euro mark, the cosmetics supply chain demonstrates common traits and particular characteristics. The companies further upstream, for example, clearly lean towards exports, and in the case of machinery, the export-production ratio is at 73%, while room for improvement is expected for the sector dealing with finished products. Over the course of discussions with operators from each individual area, a range of interesting factors have emerged, contributing to a greater understanding of the dynamics of supply chain transitions: constant investment in research and innovation is common to all, as are complaints by several parties regarding the difficulty of predicting scheduled, ongoing orders, a sign of prudence which continues to affect markets.

## Structure of the Cosmetics supply chain

	INDUSTRY	RAW MATERIALS	MACHINERY	PACKAGING	TOTAL SUPPLY CHAIN
<b>Turnover 2015</b>	<b>9,971</b>	<b>895</b>	<b>300</b>	<b>3,140</b>	<b>14,306</b>
(var.% 2015/14)	+6.0	+3.0	+2.0	+5.0	+5.5
<b>Turnover 2016</b>	<b>10,484</b>	<b>945</b>	<b>306</b>	<b>3,300</b>	<b>15,035</b>
(var.% 2016/15)	+5.1	+5.6	+2.0	+5.0	+5.1
Forecast % 2017/16	+5.0	+5.0	+2.5	+4.0	+4.5
<b>Exports 2016</b>	<b>4,275</b>	<b>315</b>	<b>225</b>	<b>1,650</b>	<b>6,465</b>
(var.% 2016/15)	+12.3	+3.2	-0.2	+10.0	+10.7
<b>Exports/turnover 2016</b>	<b>41%</b>	<b>34%</b>	<b>73%</b>	<b>50%</b>	<b>43%</b>

## IMPORTS AND EXPORTS

Since 2010, we have seen increasing interest in *Made in Italy* cosmetics, strengthening the domestic market share of our brands in foreign markets.

Accordingly, the trade balance has also increased, reaching a new record level of over 2,300 million euro. In 2016, exports performed excellently, growing by 12.3%, taking into consideration the values provided by ISTAT for January-November compared to the previous year, with a total projected value of 4,275 million euro.

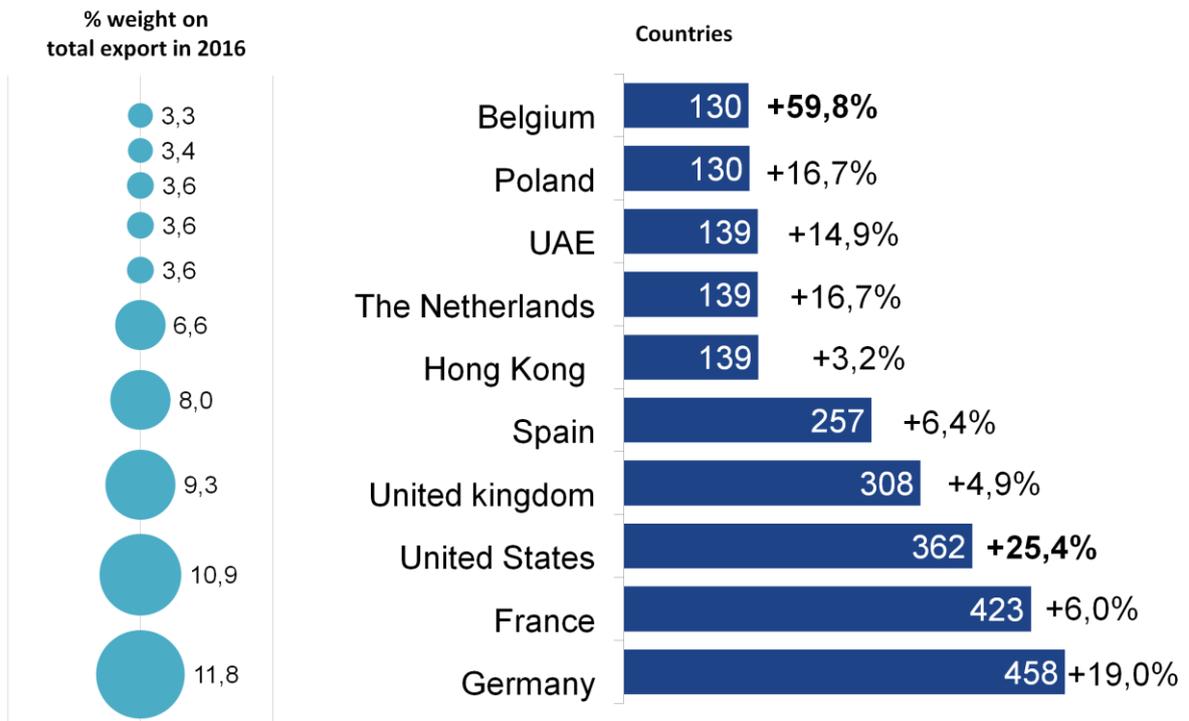
As already anticipated by the economic situation during the second half of 2016, operators in the sector are showing renewed interest in European countries, confirming this area as the main export outlet, a probable consequence of the concern regarding tensions in world politics.

Among the top ten areas are Germany (+ 19.0%), France (+ 6.0%), the United States (+ 25.4%), the UK (+ 4.9%), Spain (+6.4%) and Hong Kong (+ 3.2%), while countries dropping in the export destination rankings include the UAE and Russia, in favour of the Netherlands (+ 16.7%), Poland (+ 16.7%) and Belgium (+ 59.8%) respectively. If we extend this analysis to the top 20 countries, we can also observe positive trends in Greece (+ 10.9%), Switzerland (+ 11.2%) and Australia (+ 18.5%).

While imbalances may have partly reshaped the export markets, the degree of diversification in terms export destinations has remained unchanged. Indeed, as was the case in 2015, the concentration of shares in terms of total exports remains unchanged for the year that has just closed, with the top ten countries representing around 64% of the total value of all destinations for cosmetic products.

The ranking of the most widely-exported Italian product families in the world sees toilet waters and colognes in first place with almost 880 million euro (+ 5.8%), followed by make-up products with 794 million (+25.2 %), and then products for body care and hair care, both with a value of 732 million (+ 21.2% and + 7.3% respectively). The single best selling product is creams, with more than 730 million euro (+ 21.2%) while the best growth over the previous year was seen in lip make-up products, with a value of 232 million euro (+54.0 %).

## Italian cosmetics industry exports – top 10



## Consumption of cosmetic products in 2016 (millions of euro and % var. '16/'15)

	Pharmacies		Perfume shops		Other channels		of which supermarkets and hypermarkets		TOTAL	
<b>1. HAIR AND SCALP CARE</b>	<b>185,5</b>	<b>-0,4</b>	<b>42,0</b>	<b>-7,1</b>	<b>835,7</b>	<b>-4,7</b>	<b>394,5</b>	<b>-6,7</b>	<b>1063,1</b>	<b>-4,1</b>
Shampoos	95,3	0,7	8,2	-7,6	366,3	-3,8	180,9	-5,5	469,9	-3,0
Lotions and shock treatments	55,1	-3,1	4,3	-9,2	17,6	-3,0	5,5	-4,8	77,0	-3,4
Dyes and coloured mousses	22,2	2,1	16,4	-3,3	179,8	-6,7	76,5	-8,9	218,4	-5,6
Lacquers	0,6	3,0	3,4	-10,4	70,6	-3,2	33,4	-4,6	74,5	-3,5
Post-shampoo treatments, balsams and masks	11,4	-1,5	4,1	-6,7	126,1	-4,1	61,8	-7,2	141,6	-4,0
Fixers and structuring mousses	0,1	1,3	2,5	-13,5	28,7	-8,6	12,5	-10,9	31,3	-9,0
Gels, waters and gums	0,7	-2,6	3,2	-13,5	46,5	-6,0	24,0	-7,7	50,4	-6,5
<b>2. PRODUCTS FOR FACE CARE</b>	<b>499,4</b>	<b>2,3</b>	<b>401,4</b>	<b>2,4</b>	<b>413,0</b>	<b>-1,1</b>	<b>172,0</b>	<b>-2,5</b>	<b>1313,7</b>	<b>1,2</b>
Face and eye detergents and make-up removers	49,7	1,4	36,9	1,4	64,3	-2,1	30,8	-3,9	150,8	-0,1
Facial tissues	3,1	-9,0	4,7	0,0	36,9	-1,0	20,9	-1,7	44,7	-1,5
Toning lotions	6,3	-3,4	15,2	2,6	14,2	-9,4	5,9	-11,4	35,7	-3,6
Periocular area and specific zones	44,2	3,1	62,0	4,9	25,7	1,3	7,3	-5,5	131,8	3,6
Moisturising and nutrient creams	103,5	-1,9	49,0	0,8	90,1	-5,4	34,6	-8,4	242,6	-2,7
Anti-ageing and anti-wrinkle creams	220,5	4,9	210,4	1,2	156,4	1,3	66,6	2,1	587,3	2,6
Masks and exfoliant scrubs	11,1	12,6	18,0	19,6	14,5	20,8	4,2	3,9	43,5	18,1
Products for skin impurities	44,7	-1,6	5,2	-5,4	6,0	-23,2	0,3	-33,0	55,9	-4,9
Depigmenting products	16,4	5,9	0,0		4,9	22,3	1,5	17,4	21,4	9,3
<b>3. PRODUCTS FOR FACIAL MAKE-UP</b>	<b>56,8</b>	<b>-2,2</b>	<b>179,7</b>	<b>2,8</b>	<b>167,5</b>	<b>9,1</b>	<b>18,8</b>	<b>-0,3</b>	<b>403,9</b>	<b>4,5</b>
Foundations and coloured creams	29,2	-4,2	102,9	3,5	91,9	10,1	10,8	-0,7	224,0	5,0
Face powder	4,7	-3,3	14,4	0,0	20,7	8,3	2,3	-2,2	39,8	3,7
Cheek correctors, blushes and clays	22,9	0,6	62,3	2,4	54,9	7,7	5,7	1,4	140,1	4,1
<b>4. MAKE-UP PACKS</b>	<b>0,1</b>	<b>-51,7</b>	<b>28,4</b>	<b>1,2</b>	<b>1,6</b>	<b>23,8</b>	<b>0,3</b>	<b>5,2</b>	<b>30,1</b>	<b>2,0</b>
<b>5. PRODUCTS FOR EYE MAKE-UP</b>	<b>29,7</b>	<b>-9,1</b>	<b>132,1</b>	<b>-1,5</b>	<b>171,2</b>	<b>4,4</b>	<b>20,5</b>	<b>-6,2</b>	<b>333,0</b>	<b>0,7</b>
Shadows	4,3	19,5	24,9	-6,6	32,9	4,8	1,5	-4,6	62,1	0,7
Mascaras	15,4	-23,6	58,9	-1,8	74,7	2,4	11,6	-6,8	148,9	-2,7
Liners and pencils	10,0	12,0	48,4	1,6	63,6	6,7	7,3	-5,5	122,0	5,0
<b>6. PRODUCTS FOR LIP CARE</b>	<b>45,2</b>	<b>3,6</b>	<b>95,6</b>	<b>9,0</b>	<b>140,1</b>	<b>7,1</b>	<b>21,8</b>	<b>-3,7</b>	<b>280,9</b>	<b>6,8</b>
Lipsticks and lip glosses	11,7	2,2	77,5	7,7	87,4	10,1	5,5	-6,2	176,6	8,5
Liners and pencils	1,5	15,9	15,1	7,7	17,3	13,3	0,7	-1,3	33,9	10,9
Protections, colourless foundations and sun sticks	32,1	3,6	3,0	17,5	35,4	-2,2	15,6	-2,9	70,5	1,1
<b>7. PRODUCTS FOR HAND CARE</b>	<b>37,0</b>	<b>-2,1</b>	<b>29,5</b>	<b>-11,5</b>	<b>111,4</b>	<b>-4,1</b>	<b>16,8</b>	<b>-3,7</b>	<b>177,9</b>	<b>-5,0</b>
Creams, gels, lotions and nail products	29,6	-1,7	4,0	-11,0	33,5	4,0	3,0	-2,2	67,1	0,4
Nail varnishes	6,0	-4,0	20,4	-13,1	58,5	-7,2	6,6	-3,4	84,8	-8,5
Solvents and other products	1,4	-1,8	5,1	-5,0	19,4	-7,1	7,2	-4,5	25,9	-6,5
<b>8. PRODUCTS FOR BODY CARE</b>	<b>447,2</b>	<b>-2,1</b>	<b>132,1</b>	<b>-4,8</b>	<b>803,8</b>	<b>-1,7</b>	<b>346,8</b>	<b>-3,6</b>	<b>1383,1</b>	<b>-2,1</b>
Moisturisers, nutrients and exfoliant scrubs	86,7	-1,9	23,7	-2,7	126,0	0,2	45,1	-2,8	236,5	-0,9
Multipurpose creams	39,2	2,3	4,8	-6,7	47,4	2,0	14,7	4,6	91,4	1,6
Body waters and oils	17,0	-4,4	7,4	-6,7	7,6	9,5	1,8	15,1	32,1	-2,0
Anti-cellulite products	49,9	-10,2	7,7	-19,0	29,4	2,9	8,3	-1,9	86,9	-7,1
Firming agents, specific zone and anti-ageing products	34,1	-7,1	10,6	-1,7	24,8	-7,1	7,4	-10,5	69,5	-6,3
Deodorants and antiperspirants	59,1	-1,7	16,7	-8,5	342,3	-2,9	174,5	-4,1	418,1	-2,9
Hair removers	2,8	-8,4	5,6	-6,7	59,3	-3,7	29,1	-6,6	67,8	-4,2
Sunscreens and pigmenting products	158,3	0,9	55,6	-2,1	167,0	-1,3	65,8	-2,9	380,9	-0,5

	Pharmacies		Perfume shops		Other channels		of which supermarkets and hypermarkets		TOTAL	
<b>9. PRODUCTS FOR BODY HYGIENE</b>	<b>272,6</b>	<b>0,9</b>	<b>28,8</b>	<b>-7,5</b>	<b>800,7</b>	<b>-1,6</b>	<b>383,0</b>	<b>-2,6</b>	<b>1102,1</b>	<b>-1,1</b>
Soaps and syndets	38,7	-1,4	3,4	0,0	68,5	-6,6	32,6	-5,9	110,6	-4,7
Liquid soaps	14,3	4,9	1,9	0,0	152,3	-0,6	80,7	-2,3	168,5	-0,2
Bath and shower foams, salts, powders and oils	51,8	2,2	17,6	-11,7	370,9	-1,4	178,2	-1,7	440,3	-1,5
Talcs and powders	3,1	-7,1	2,8	0,0	23,1	-3,0	7,0	-2,1	29,1	-0,7
Products for foot hygiene	17,9	-5,7	1,0	0,0	20,7	-7,7	11,8	-7,0	39,6	-6,6
Products for intimate hygiene	146,7	1,7	2,2	0,0	165,2	0,1	72,8	-2,8	314,0	0,9
<b>10. PRODUCTS FOR ORAL HYGIENE</b>	<b>145,0</b>	<b>-0,8</b>	<b>4,4</b>	<b>0,0</b>	<b>565,1</b>	<b>0,3</b>	<b>302,2</b>	<b>1,0</b>	<b>714,4</b>	<b>0,1</b>
Toothpastes	66,4	-0,3	4,0	0,0	446,8	0,4	237,9	1,8	517,2	0,3
Mouthwashes, breath fresheners	78,5	-1,1	0,4	0,0	118,3	-0,2	64,3	-2,0	197,3	-0,6
<b>11. SKIN CLEANSING PRODUCTS FOR INFANTS</b>	<b>90,7</b>	<b>-0,9</b>	<b>0,0</b>	<b>0,0</b>	<b>114,7</b>	<b>-2,9</b>	<b>96,0</b>	<b>-5,3</b>	<b>205,4</b>	<b>-2,0</b>
<b>12. PRODUCTS FOR MEN</b>	<b>10,8</b>	<b>-0,9</b>	<b>38,4</b>	<b>-1,8</b>	<b>116,7</b>	<b>-1,8</b>	<b>44,4</b>	<b>-6,6</b>	<b>165,9</b>	<b>-1,7</b>
Soaps, shaving foams and gels	3,6	-2,0	5,6	-1,7	59,6	-3,8	23,0	-7,3	68,8	-3,5
After shave products	3,7	-1,2	10,3	-1,9	42,0	-1,0	16,2	-6,7	55,9	-1,2
Treatment creams	3,5	0,6	22,5	-1,8	15,1	4,4	5,2	-3,1	41,2	0,6
<b>13. ALCOHOL-BASED PERFUME PRODUCTS</b>	<b>11,8</b>	<b>2,1</b>	<b>808,1</b>	<b>1,4</b>	<b>244,2</b>	<b>5,5</b>	<b>18,0</b>	<b>-7,5</b>	<b>1064,2</b>	<b>2,5</b>
Toilet waters and perfumes for women	11,2	2,1	510,8	1,5	139,9	5,8	8,8	-6,1	661,8	2,4
Toilet waters and perfumes for men	0,6	1,9	297,4	1,3	104,4	5,0	9,2	-8,7	402,4	2,2
<b>14. GIFT PACKS</b>	-	-	<b>97,9</b>	<b>3,2</b>	<b>4,4</b>	<b>-1,1</b>	<b>4,5</b>	<b>-1,1</b>	<b>102,3</b>	<b>3,0</b>
Gift packs for women	-	-	59,1	2,6	2,7	-1,2	2,0	-1,2	61,7	2,4
Gift packs for men	-	-	38,8	4,2	1,7	-1,1	2,6	-1,1	40,5	4,0
<b>Total traditional channels</b>	<b>1831,6</b>	<b>-0,1</b>	<b>2018,4</b>	<b>0,9</b>	<b>4490,1</b>	<b>-0,8</b>	<b>1839,6</b>	<b>-3,4</b>	<b>8340,0</b>	<b>-0,2</b>
<b>Door-to-door sales</b>									<b>467</b>	<b>1,0</b>
<b>Mail order sales</b>									<b>290</b>	<b>21,0</b>
<b>Sales to beauty salons and centres</b>									<b>230</b>	<b>2,1</b>
<b>Professional hairdressing</b>									<b>563</b>	<b>1,0</b>
<b>TOTAL CONSUMPTION</b>									<b>9.890</b>	<b>0,5</b>