



# **OVERVIEW OF THE COSMETICS INDUSTRY IN ITALY**

**FABIO BERCHI**

**Board member in charge of  
Internationalization of Cosmetica Italia**



# Cosmetica Italia the personal care association



**618**

Associated companies  
(95% of them are SME)



**36.000 → 400.000**

The supply chain employs 36.000 people,  
which rise to 400.000 thousand with the **entire economic system of the sector**

**Cosmetica Italia** is a member of  
**Federchimica** and it's the only  
Association representing this sector

It is the biggest association at  
European level and is a member  
of **Cosmetics Europe**.

Partner of **BolognaFiere** in  
the promotion of **Cosmoprof**  
in Italy and worldwide.

# The dimension of Italian cosmetics industry

Italy is the **fourth economic system** of cosmetics after Germany, the United Kingdom and France, it is enriched and strengthened by belonging to the concept of **Made in Italy**, the third brand in the world

Global **turnover** of the Italian cosmetics industry

10.6 bn

The Italian economic system of the entire **cosmetics supply chain**

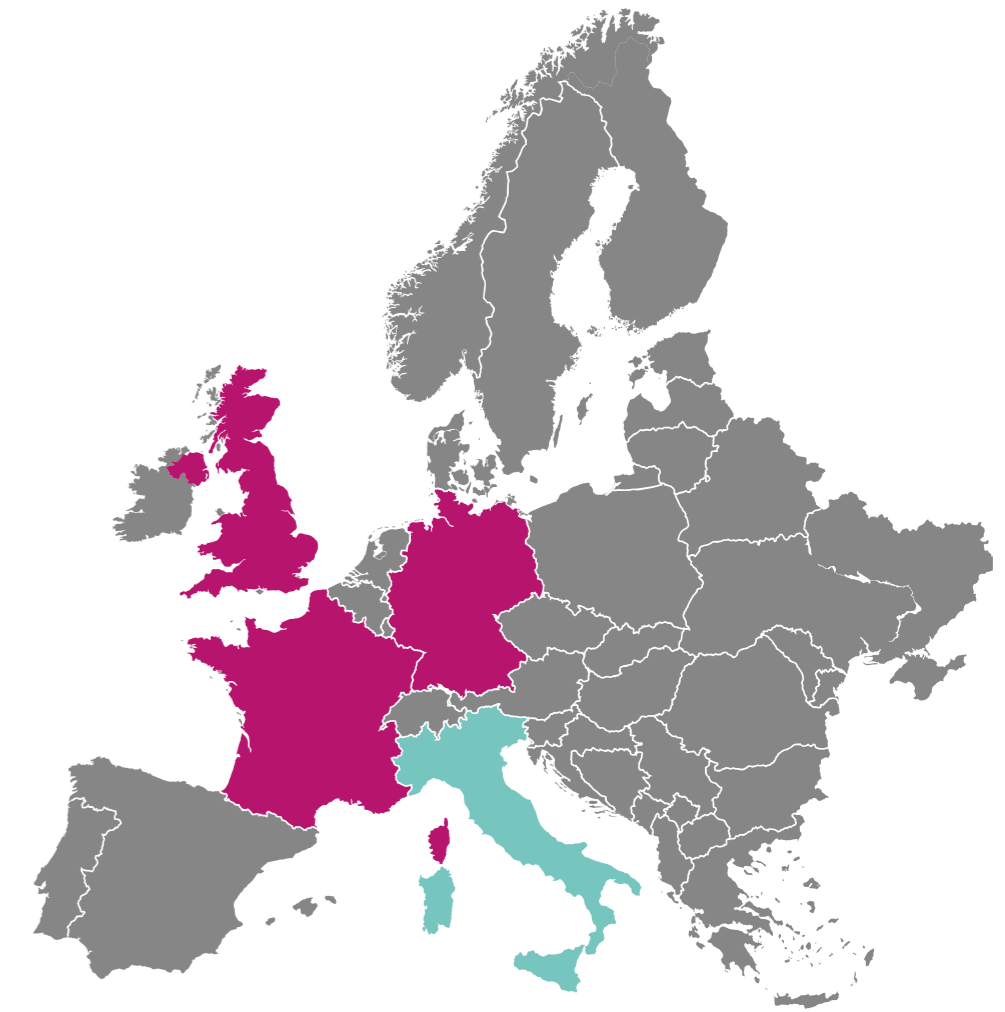
33.2 bn

The Italian cosmetics **trade balance**

2.3 bn

**Consumption** in Europe

76.7 bn



# Italian cosmetics companies are a successful entrepreneurial network

- Global leader in **make up manufacturing**:  
in **Europe**, the percentage of make up produced by Italian companies is **67%**,  
**worldwide** it reaches **55%**
- Global competitor in **selective perfumery**
- Trend setter in **design and packaging**
- Innovative in **formulations, colors, communication** and **development of new products**



# COVID-19 actions and effects on cosmetics industry

## POSITIVE ELEMENTS

Flexibility and adaptation to the scenario

Digital and e-commerce investments

High qualitative standards

Constant R&D investments

*Made in Italy* appeal

## NEGATIVE ELEMENTS

Planning difficulties

Budgets decrease

New solutions in channel distribution

Low consumption attitude

Changes in consume basket










# Evolution of the cosmetics industry

	Value 2020	Change % 2020-19	Forecast % 2021-20
Turnover in Italy	6,488	-8.7	6.7
<i>professional channels</i> <i>hairdressing, beauty salons</i>	597	-24.2	10.1
<i>other sales channels</i> <i>mass market, perfume shops, pharmacies, herbalist shops, direct sales, e-commerce</i>	5,891	-6.8	6.5
Exports	4,154	-16.7	5.0
<b>Total cosmetic sector turnover</b>	<b>10,641</b>	<b>-12.0</b>	<b>6.2</b>

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



# The leading sectors of Made in Italy

		EXPORTS		TRADE BALANCE	
		Value 2020	Change % '20-'19	Value 2020	Value change '20-19
	Fashion	17.971	<b>-16,8%</b>	5.332	<b>-1.599</b>
	Forniture	8.897	<b>-14,4%</b>	6.966	<b>-892</b>
	Wine	6.285	<b>-2,3%</b>	5.984	<b>-114</b>
	Cosmetics	4.154	<b>-16,7%</b>	2.307	<b>-468</b>
	Pasta	3.119	<b>+15,5%</b>	3.019	<b>408</b>
	Eyewear	2.807	<b>-26,0%</b>	1.942	<b>-694</b>
	Boats & yachts	2.016	<b>-7,7%</b>	1.789	<b>-100</b>
	Motorbikes	1.405	<b>+1,0%</b>	464	<b>88</b>
	Helicopters	213	<b>-23,3%</b>	123	<b>-10</b>

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



# Italian cosmetics exports in 2019 and 2020 by categories

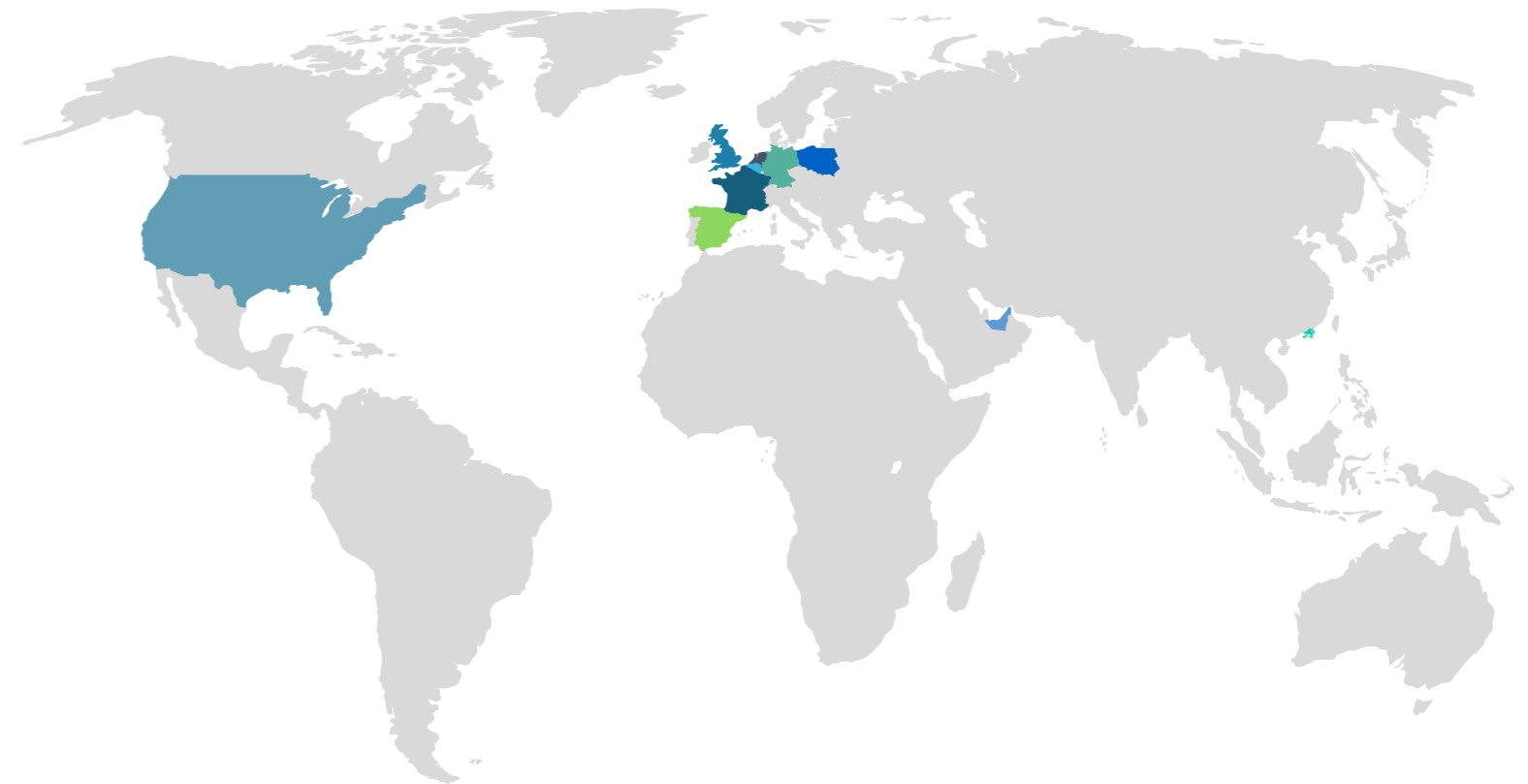
	Value 2019 & change % 19-18	Value 2020 & change % 20-19
Alcohol-based perfumery	<b>1,173</b> (+3.2%)	<b>913</b> (-22.1%)
Face and body care	<b>1,038</b> (+3.1%)	<b>918</b> (-11.5%)
Make-up products	<b>997</b> (-0.7%)	<b>680</b> (-31.8%)
Products for haircare	<b>996</b> (+4.1%)	<b>917</b> (-7.9%)
Personal hygiene	<b>377</b> (-15.9%)	<b>314</b> (-16.7%)
Oral hygiene	<b>227</b> (+6.4%)	<b>237</b> (+4.3%)
Products for men	<b>41</b> (-8.2%)	<b>33</b> (-19.2%)
<i>Other products</i>	<b>136</b> (+0.6%)	<b>142</b> (+4.1%)
<b>Total</b>	<b>4,985</b> (+0.8%)	<b>4,154</b> (-16.7%)



# Italian cosmetics exports in 2020 the top 10 destinations

	Value mio/€ 2020	Change % '20-'19
1. France	504	-18.1%
2. Germany	448	-20.8%
3. USA	414	-19.3%
4. UK	268	-24.8%
5. Spain	246	-19.2%
6. Hong Kong	244	+0.3%
7. Netherlands	165	-3.8%
8. Poland	155	-6.2%
9. UAE	103	-25.8%
10. Belgium	97	-32.3%

**64%** of all exports are concentrated  
in the top ten countries



ISTAT data elaborated by Cosmetica Italia Statistics Dept.  
Values in millions of Euros and change % 2020-2019

# Italy - India cosmetics exports

CATEGORIES	Value 2019	Change % 19-18	Value 2020	Change % 20-19
Alcoholic perfumery	8.8	+33.5%	3.4	-61.7%
Face and body products	3.0	-19.2%	1.7	-43.7%
Make-up products	4.2	+34.2%	1.4	-67.0%
Hair products	1.5	+4.9%	1.3	-8.4%
Oral hygiene products	0.3	+39.9%	0.2	-15.2%
Personal hygiene products	0.1	-13.6%	0.1	-60.7%
Products for men	0.02	+106.1%	0.01	-79.7%
Other products	3.4	+22.2%	2.6	-23.6%
<b>TOTAL EXPORTS</b>	<b>21.2</b>	<b>+18.5%</b>	<b>10.6</b>	<b>-49.9%</b>

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



[www.cosmeticaitalia.it](http://www.cosmeticaitalia.it)



 COSMETICA ITALIA  
the personal care association