

# Beauty Care

*Trends that are redefining personal well-being*

**NIQ per Cosmoprof**

March 2026

**NIQ**



# Fast-Moving Consumer Goods

# WHO IS THE CONSUMER TODAY

## Holistic approach to wellness

**21 million** of Italians declare that they are very attentive to their appearance and their image

Beauty is in **6th** place on the priority scale of Italians



**1 in 2** use wellness supplements

**1 in 4** does slimming diets (+12% vs 2019)

**1 in 3** practices physical activity (+12% vs 2020)





Consumers continue to develop these habits:



Shop more frequently

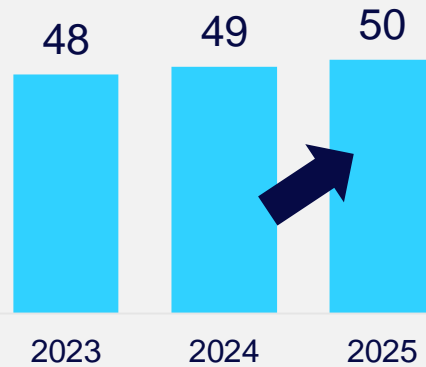


Resize your shopping cart by reducing Personal Care and Beauty consumption

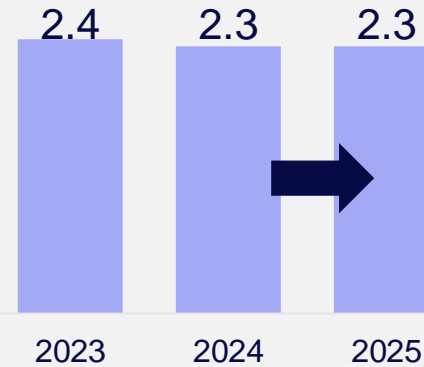
## PERSONAL CARE



Frequency



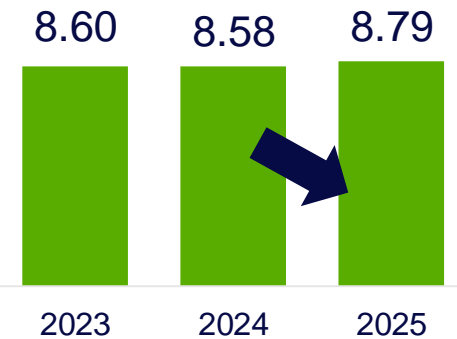
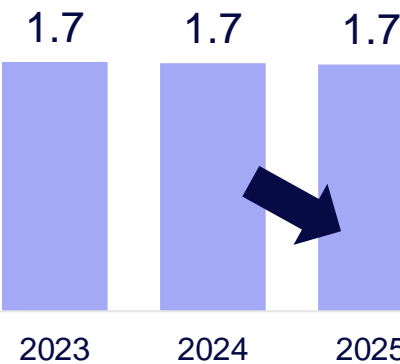
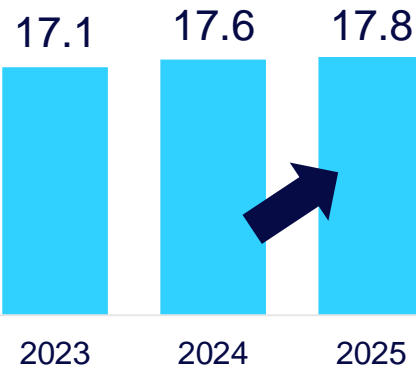
Average Units per occasion



Average spend per act

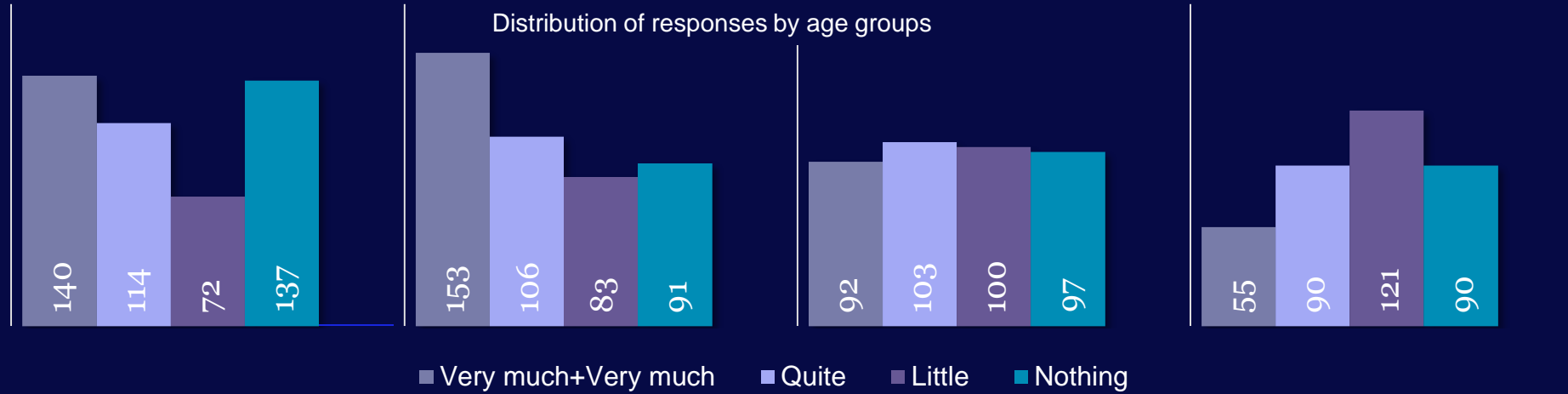


## BEAUTY

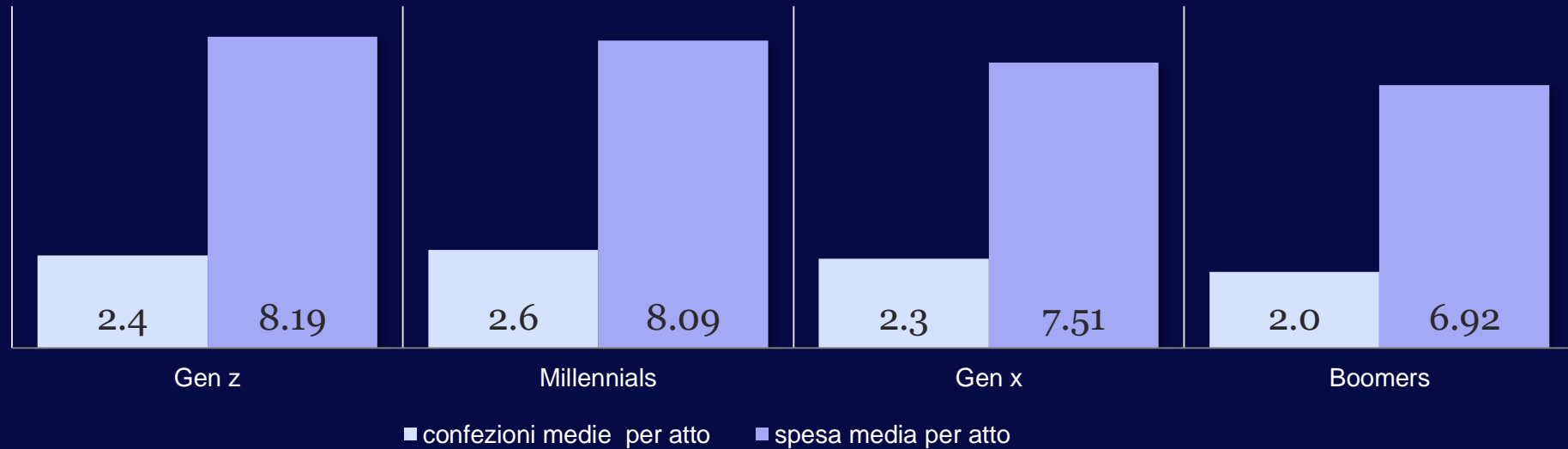


# How much do Italians spend on personal care products?

## What they declare...



## What we observe...



**Younger people say they spend a lot on personal care and their spending is high because they buy more packs**

**Gen Z orients their choices mainly through packaging and recommendations from other users.**

**Older generations, such as Gen X, live in the age of rationality, basing their choices on concrete and measurable factors.**

## Gen Z



## Gen X



The categories that enter the shopping basket differ according to age: more beauty and more experimentation among the youngest, more treatments and routine products among the over 50s



## Under 50

- DIAPERS
- EYE COSMETICS
- INSECT REPELLENTS
- WAX COSMETIC HAIR REMOVAL
- DRY SHAMPOO
- FACIAL CLEANSING
- CHILD HYGIENE
- FACE CARE MASKS
- UNISEX PERFUMES
- FACE COSMETICS
- HAIR MASKS
- BODY SCRUB TREATMENT
- HAIR ACCESSORIES
- FACIAL COSMETICS
- RAZORS AND BLADES

## Over 50

- LIP COSMETICS
- FOOT TREATMENT
- FACIAL CARE SPECIFIC AND ANTI-AGING...
- BODY TREATMENT
- FACIAL CLEANSING
- SHOWER ROOMS
- TANNING SUNSCREENS
- HAIR DYES
- TOOTHPASTES
- DEODORANTS
- TOOTHBRUSHES
- COSMETIC HAIR REMOVAL CREAMS
- CORRECTIVE FACE COSMETICS - BLUSH - ...
- RAZORS AND BLADES SYSTEMS



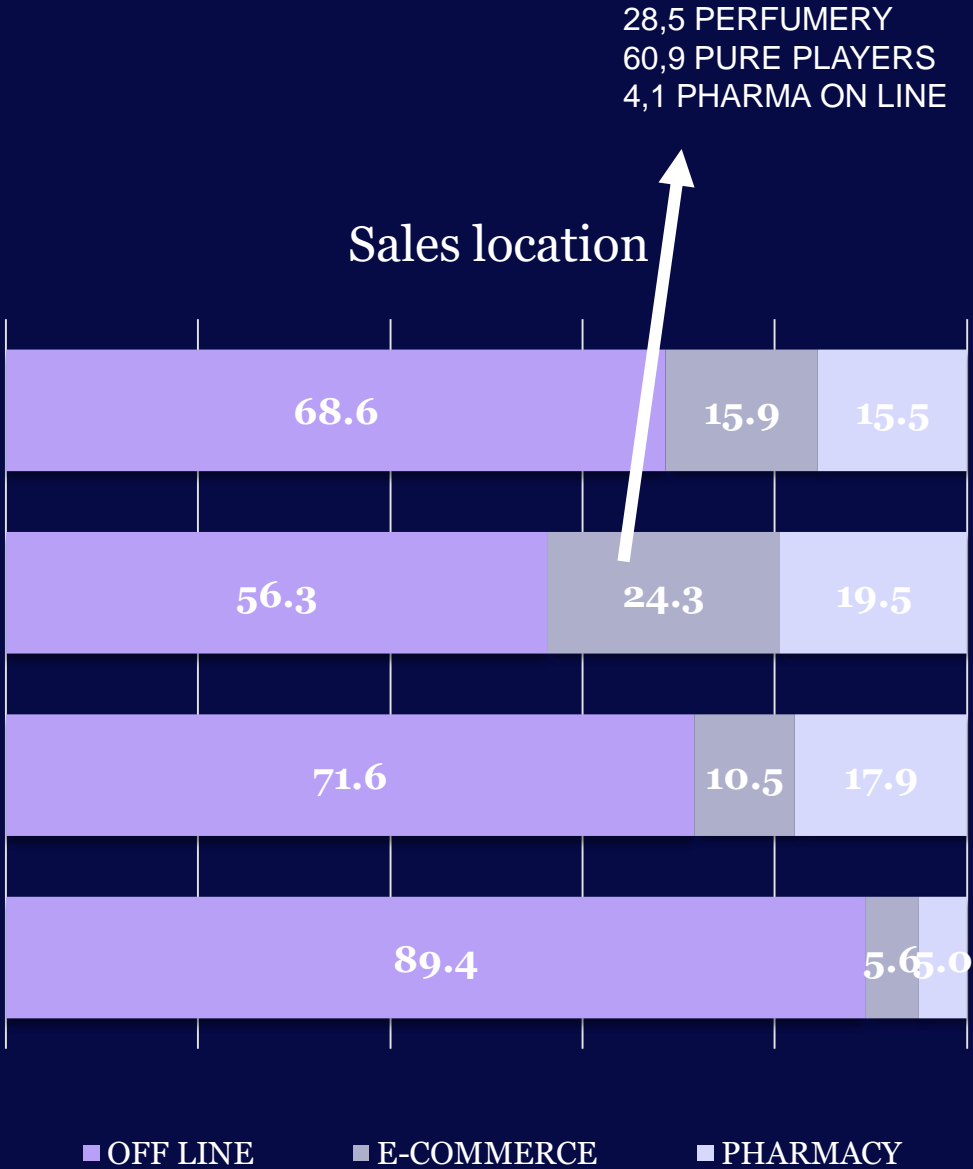


**Beauty grows in value thanks to Fragrance and Hair Care**


|                     | TREND VALUES |             | Value weight of the categoriss  |
|---------------------|--------------|-------------|---------------------------------|
| <b>BEAUTY</b>       |              | <b>1.2%</b> | <b>€5.8bn<br/>(47.9% on PC)</b> |
| <b>COSMETIC</b>     | <b>-4.5</b>  |             | <b>14,3</b>                     |
| <b>FRAGRANCE</b>    |              | <b>4.7</b>  | <b>10,5</b>                     |
| <b>HAIR CARE</b>    |              | <b>3.1</b>  | <b>28,2</b>                     |
| <b>HAIR REMOVAL</b> |              | <b>0</b>    | <b>9,3</b>                      |
| <b>SKIN CARE</b>    |              | <b>1.4</b>  | <b>37,8</b>                     |

Personal care is among the most purchased categories in e-commerce ... but within it reserves deep differences

|                            | OFFLINE     | E-COMMERCE  | PHARMACY    |
|----------------------------|-------------|-------------|-------------|
| <b>TOTAL PERSONAL CARE</b> | <b>0,4</b>  | <b>3,6</b>  | <b>-1,8</b> |
| <b>BEAUTY</b>              | <b>2,0</b>  | <b>1,1</b>  | <b>-1,8</b> |
| <b>DETERGENTS</b>          | <b>0,3</b>  | <b>9,8</b>  | <b>-1,0</b> |
| <b>ABSORBENCY</b>          | <b>-1,1</b> | <b>13,9</b> | <b>-4,1</b> |

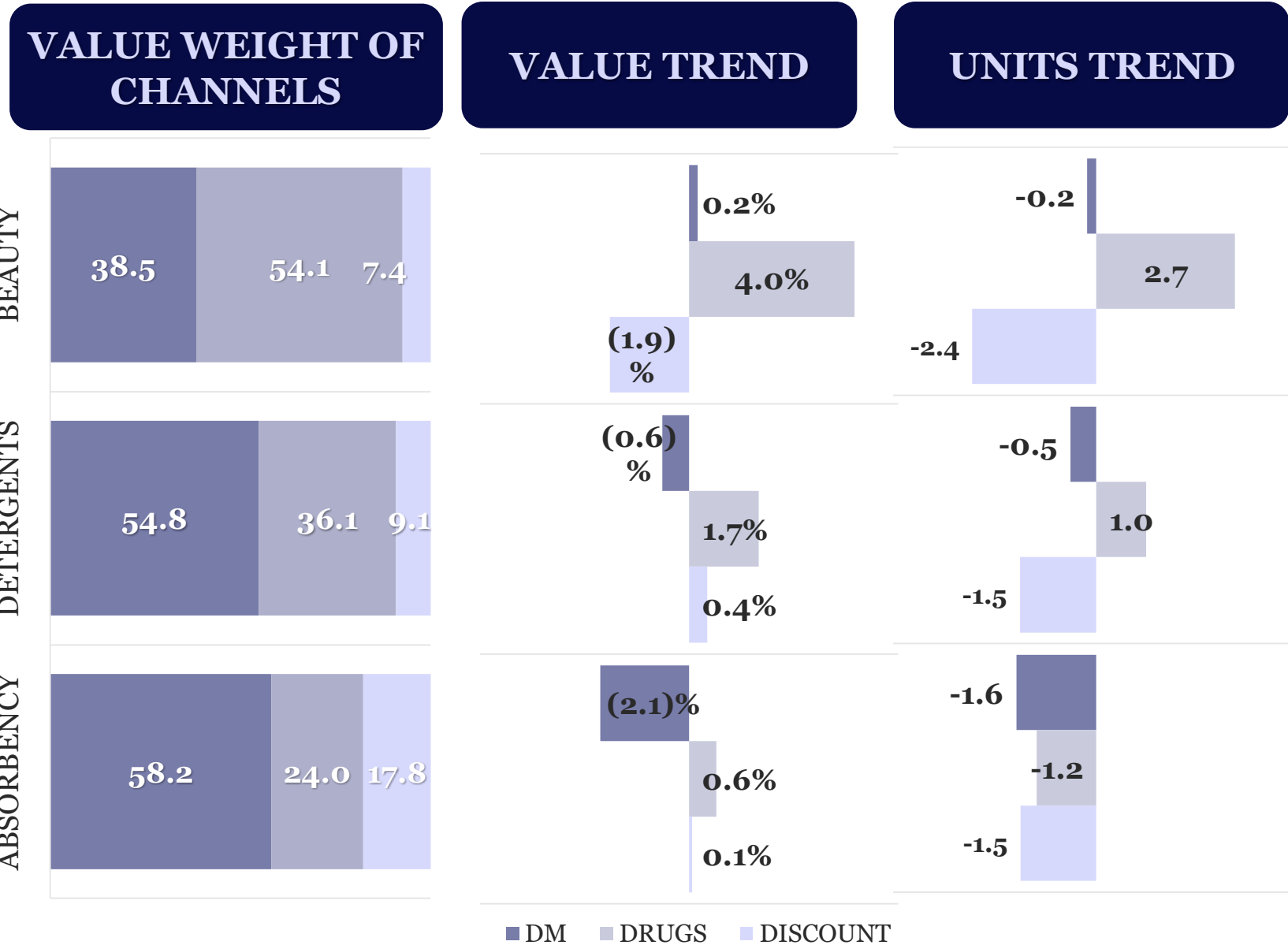


Beauty is among the most purchased categories in e-commerce ... but within it reserves deep differences

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|--|------------|------------|-------------|
|  <b>BEAUTY</b> | <b>2,0</b> | <b>1,9</b> | <b>-1,8</b> |
| COSMETIC   | -3,3       | -4,3       | -11,3       |
| FRAGRANCE  | 5,7        | 5,3        | -9,6        |
| HAIR CARE  | 4,1        | 1,3        | -0,9        |
| HAIR REMOVAL   | -1,1       | 7,4        | 0,2         |
| SKIN CARE  | 2,2        | 4,2        | -0,7        |



The drugstore has a greater weight for the beauty sector than for the other sectors of personal care.

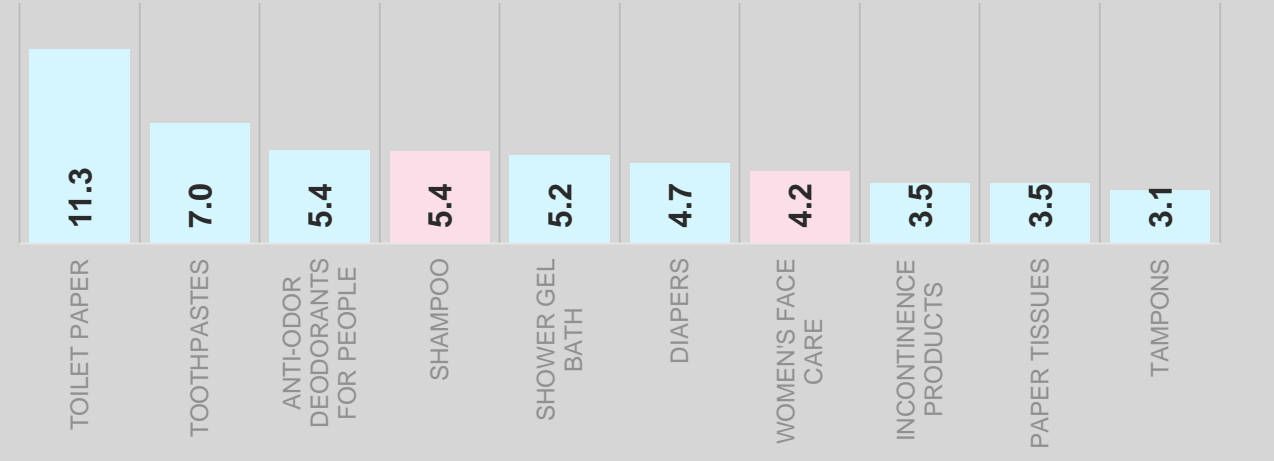


In supermarkets and discounters, the share of beauty is significantly reduced in favor of absorbency and detergents. The preferred channel for buying beauty is the drugstore.

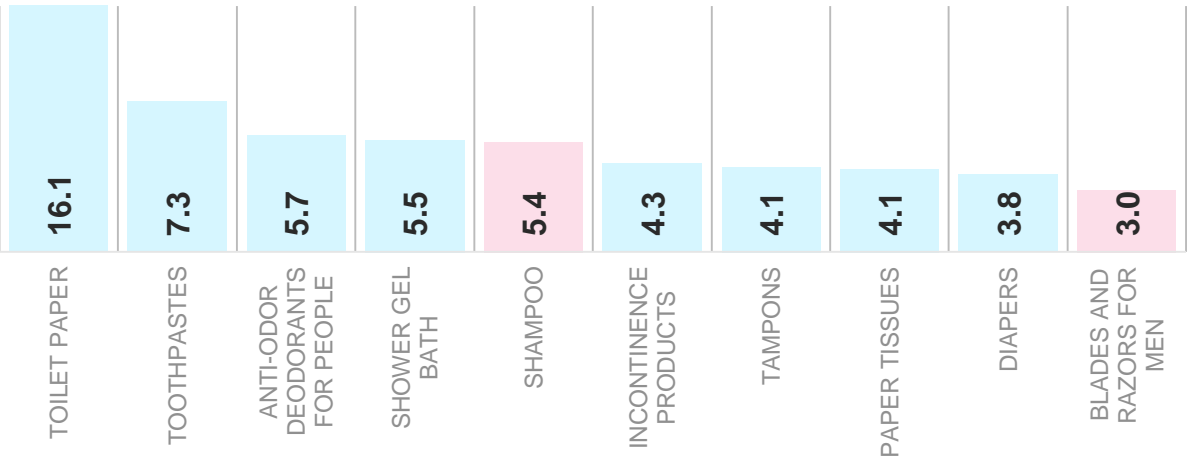


Category Weight by Channel

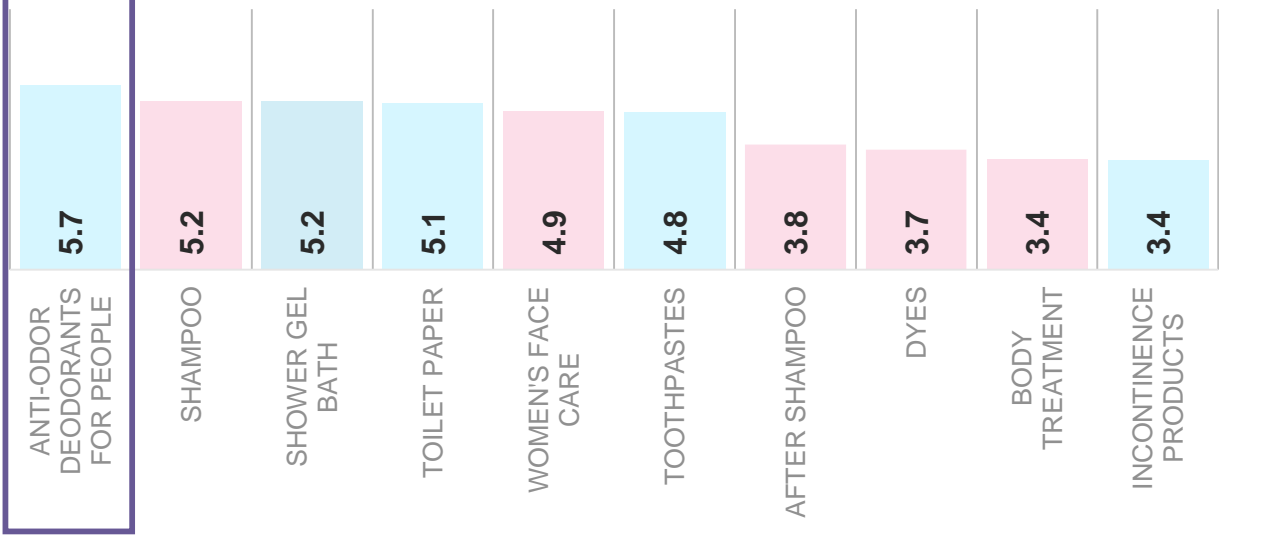
**HYPER**



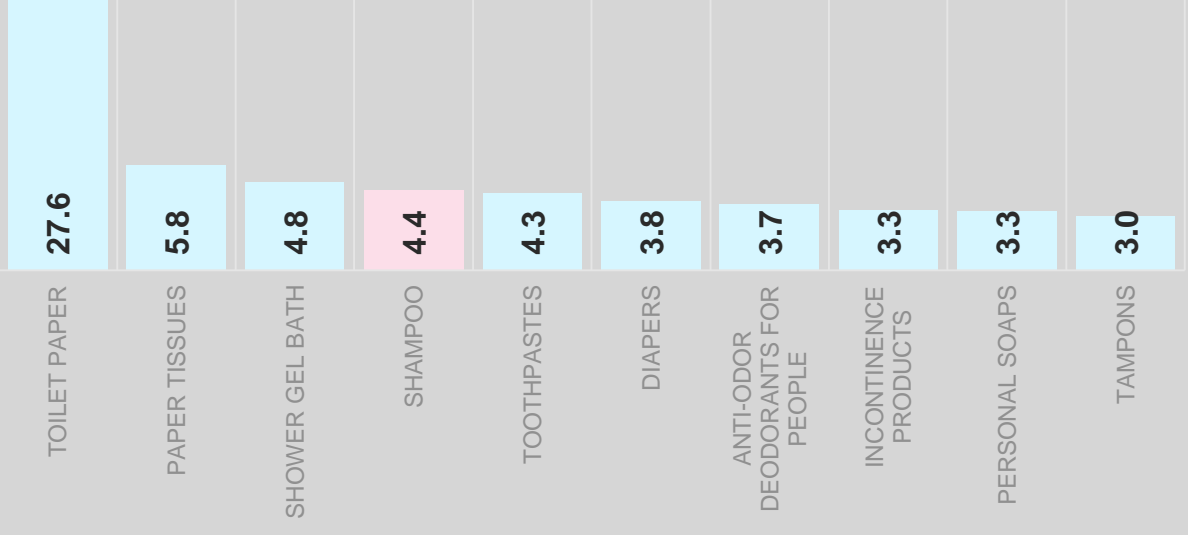
**SUPER**



**DRUGSTORE**

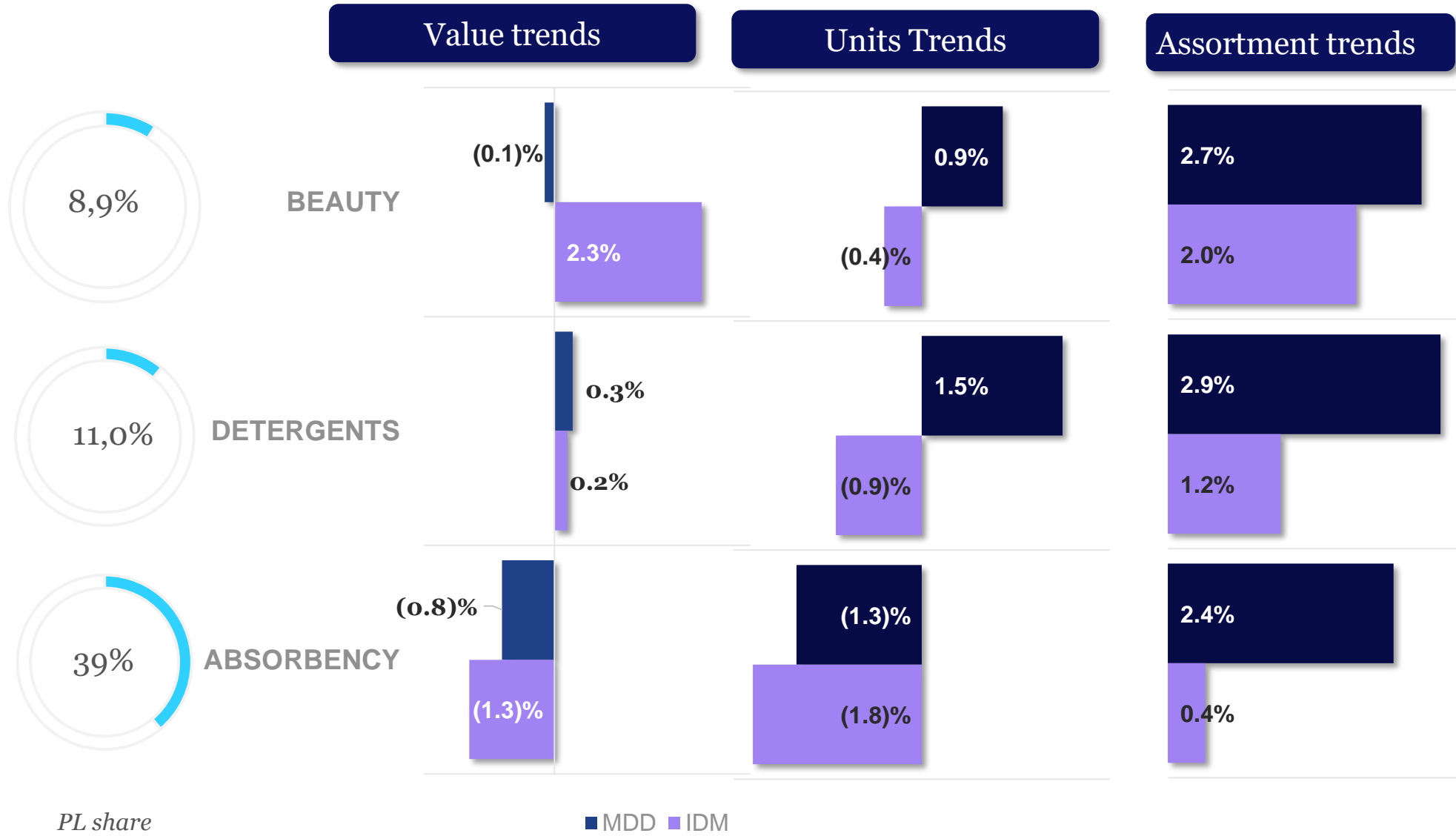


**DISCOUNTERS**





*Both Branded products and PLs must respond to an evolving demand with a targeted assortment*



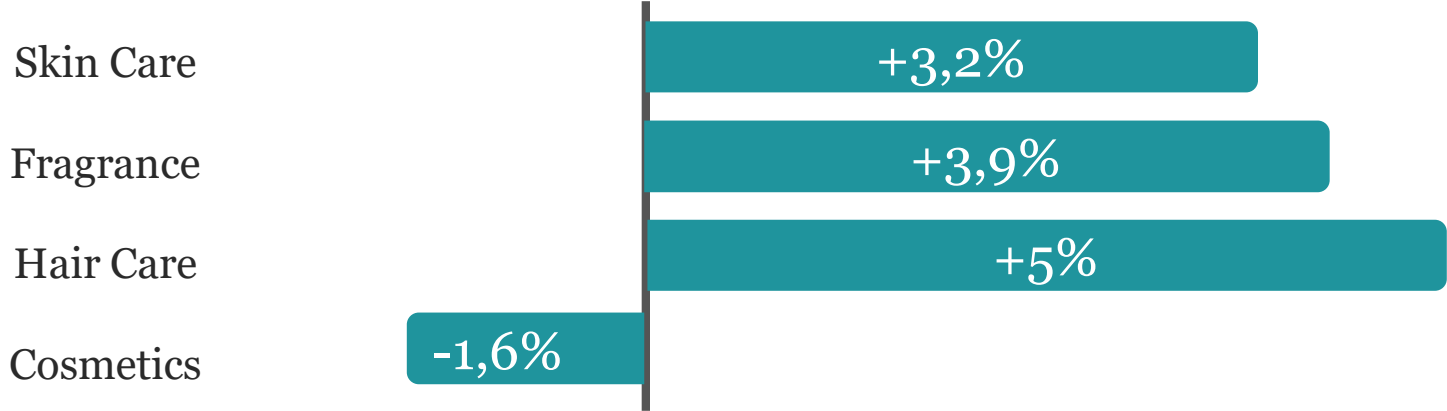


# Beauty

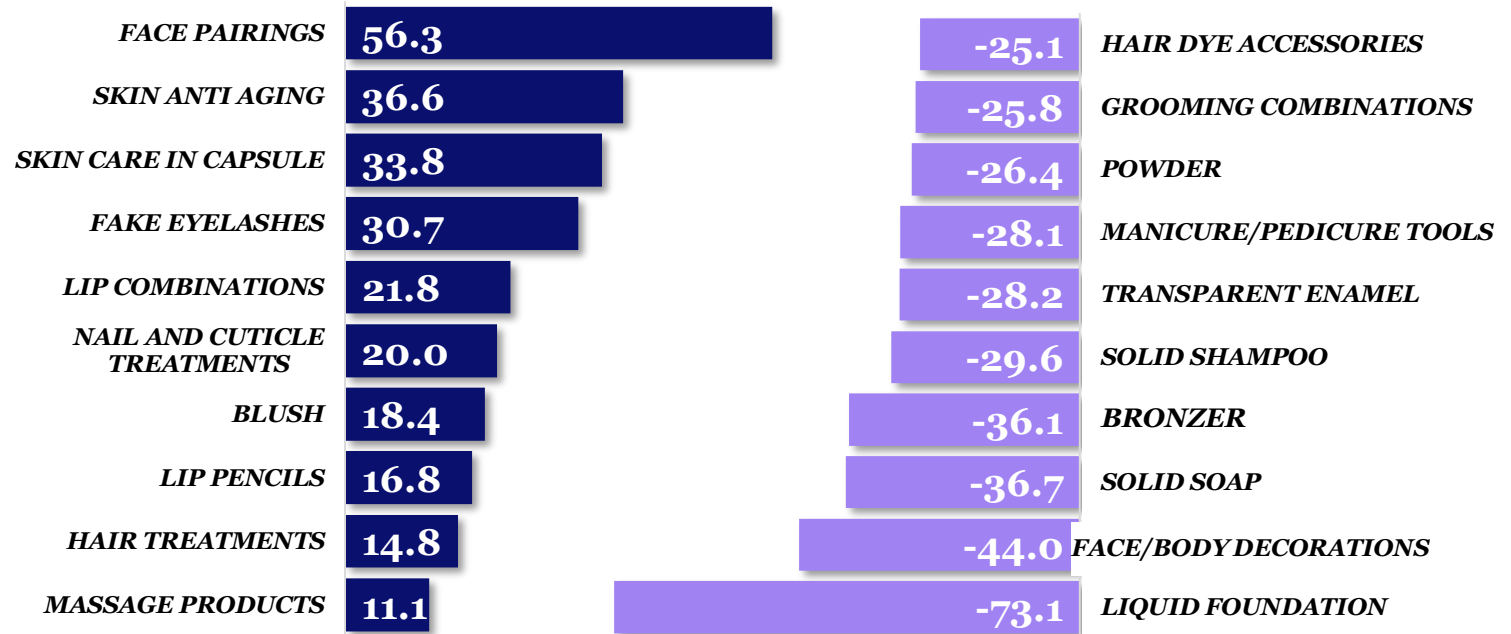
Traditional cosmetics are experiencing a downturn. New segments are growing that bring treatments and beauty routines directly into the home.

## Beauty categories

Value % Change vs YA - Italy



## The Beauty segments



# Top claim del personal care

% Turnover

**24,8%**

## *Protect & Repair*

**+5.9% in value**  
**+2,2% a volume**

**10,5%**

## *Moisturizes and renews*

**-1.5% in value**  
**-7,0% a volume**

## *Free-From 12,2%*



Assortment reduction **-4.5%**



Claim "paraben-free" and "colouring-free" in decline

**- 9.3% Val;**  
**- 9.2% Vol.**

**-13.4% Val;**  
**-13.5% Vol.**

## "Allergen-free"

**+10.8% Val**

**+3.0% Vol**

Growing demand

**+7.1 pp**



## *Rich-in 7,3%*

Vitamin

**8.20**

**1.50**

Hyaluronic acid

**18.80**

**2.30**

Collagen

**-1.70**

**31.00**

■ Trend % Val. ■ Trend % Vol.

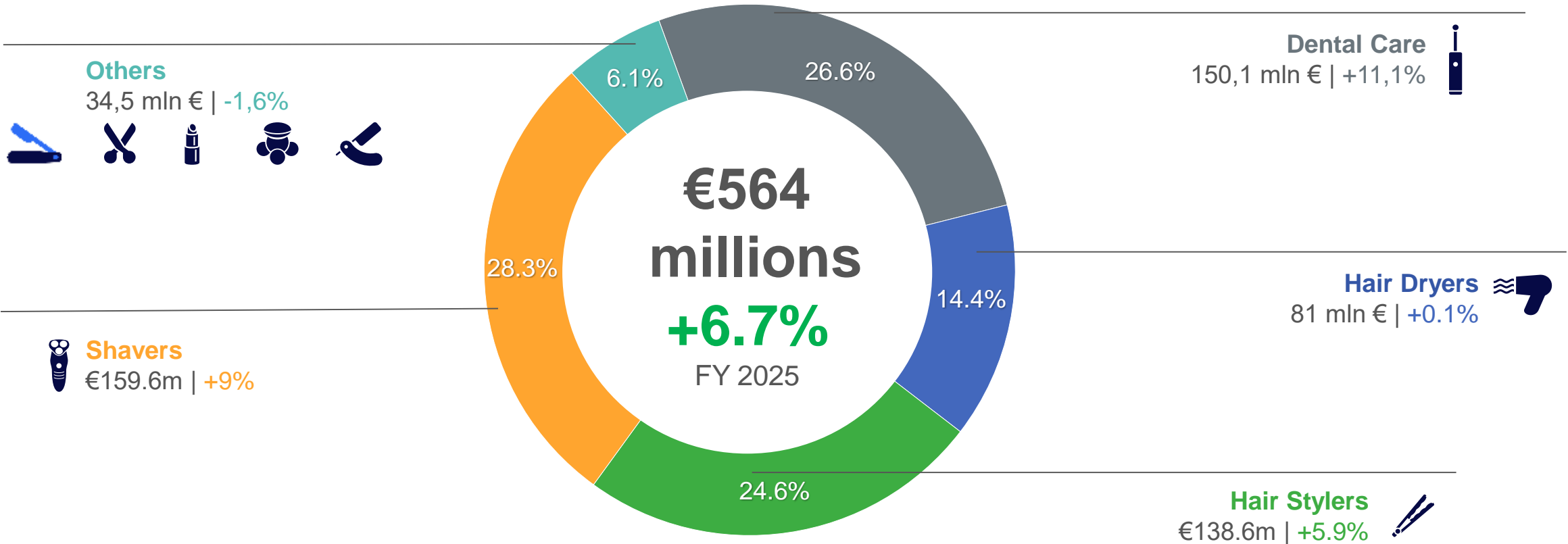
# Tech & Durables

# BEAUTY Small Domestic Appliances grow +6,7% in 2025

Dental Care, Shavers e Hair Stylers are driving the growth .



Small Domestic Appliances, Beauty Categories | Italy | Sales Value EUR and Trend % | Italy | FY 2025



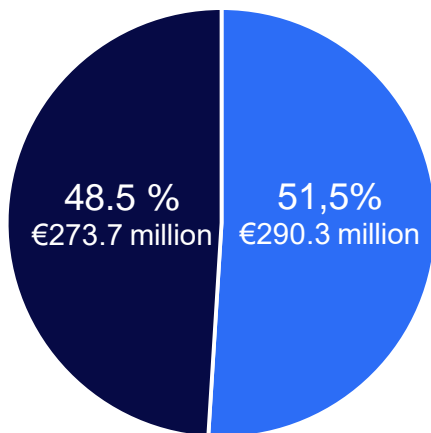
SDA 9 products (Dental care, Hair clippers, Hair dryers, Hair stylers, El. Male System Razor Blades, El. Massagers, Electric Cosmetics, Balneo Therapy, Shavers,)

Source: NIQ Market Intelligence POS Sales Tracking, Channels: B2C Retail Market: Electrical Retailers + Iyper, super + pure players + discounters + VarSt + Mail Order Houses

Online channel for SDA Beauty has overtaken traditional channel as value sales in 2025.

## FOCUS ONLINE

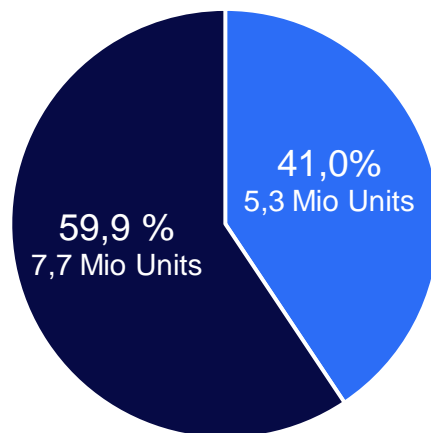
VALUE



● Online Sales  
+14,5%

● Traditional Sales  
-0,5%

VOLUME (+5,2% vs 2024)



● Online Sales  
+10,6%

● Traditional Sales  
+1,7%

## FOCUS ON NEW LAUNCHES

### VALUE OF NEW LAUNCHES

(First NIQ tracked sale of models sold in 2025)

**€75 million**

13.3% of total SDA beauty revenue in 2025



**50.8%**

ONLINE

50% of sales of products launched in 2025 took place in the Online channel.  
Consumers' response to new launches in the Online channel is very high.

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Source: NIQ Market Intelligence POS Sales Tracking, Channels: B2C Electrical Retailers + Hyper + super + pure players + discount + VarSt + Mail Order Houses

# SDA Beauty Market Description



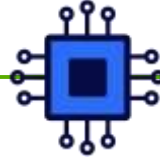
## PRAGMATISM

- Consumers are pragmatic, prioritizing value for money and essential purchases.



## Brand Landscape

- SDA Beauty markets feature emerging brands that are gaining share thanks to a "digital first" strategy and a presence on social media and e-commerce, particularly for personal care products.
- Brand loyalty is low and cross-brand switching is high in the current environment



## Smart Utility

- Innovation is shifting from flashy "smart" features to smart, truly functional upgrades.
- Multifunctionality is a key driver of premiumization in SDA Beauty



## Price & Promotions

- Prices have normalized over the past couple of years, but premium categories continue to drive growth.
- Consumers are willing to buy quality products during promotions, but that doesn't mean they're buying cheap products – they're looking for value at discounted prices



## Themes driving demand

- Innovation and portability drive demand in personal care.

# Technological innovations in SDA Beauty market

## Smart haircare expansion

Haircare with AI-powered hair dryers and stylers, featuring intelligent heat control, red light stimulation, and real-time feedback. Plus, high-speed hair dryer and multi-styler with oil infusion, stepless temperature control and app customization.

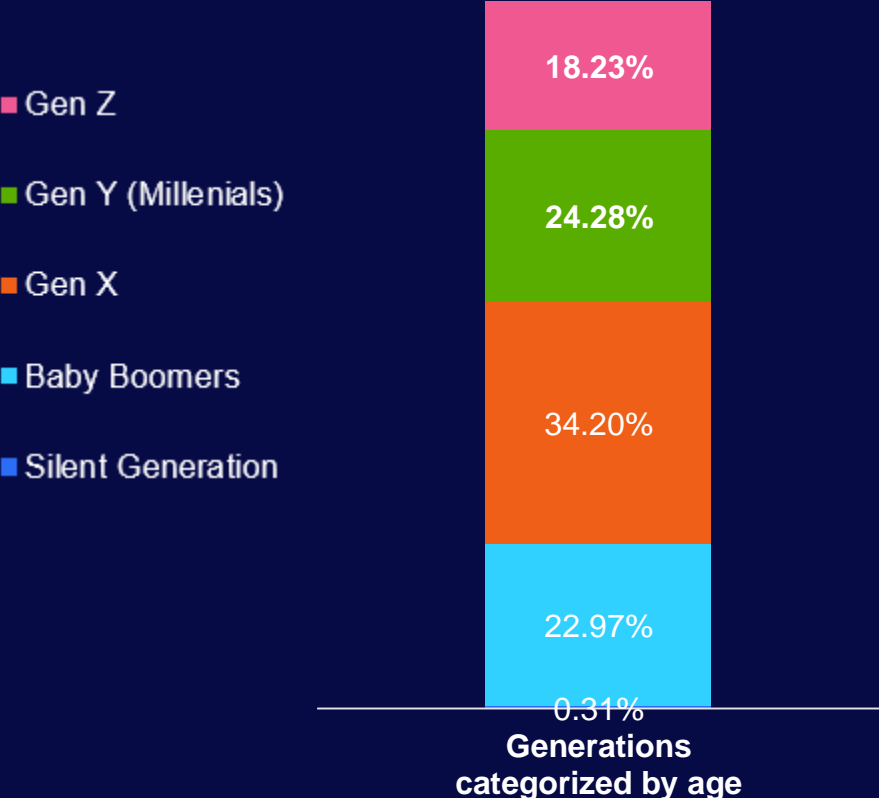
## Shavers & Dental tech upgrade

New AI-powered personal care tools offer accuracy, portability, and smart displays.

Source: Gfknewron Consumer: SDA 4: Hair Dryer, Hair Styler, Shavers, Dental Care, Shavers Period: Jan-Dec2025, Italy

# Gen X & Baby boomers account for more than half of Italian consumers for SDA BEAUTY.

Generational Share dello SDA BEAUTY:  
gfknewron Consumer





**Thank you**

**NIQ**