



Beauty and Personal Care in Italy

May 2025

Table of Contents

EXECUTIVE SUMMARY

Beauty and personal care in 2024: The big picture
2024 key trends
Competitive landscape
Retail developments
What next for beauty and personal care ?

MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2019-2024
Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2019-2024
Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2020-2024
Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2020-2024
Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2021-2024
Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2019-2024
Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2019-2024
Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2024
Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2024-2029
Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Baby and child-specific sun care one of the few bright spots as declining birth rates continue to undermine sales
Sun care brands thrive as players focus on natural and sustainable solutions
Health and beauty specialists capture a significant share of sales thanks to trusted image

PROSPECTS AND OPPORTUNITIES

Sun care likely to remain one of the few bright spots as birth rates continue to fall
'Sephora Kids' trend could present new opportunities for development
Players will need to innovate to remain relevant

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2019-2024
Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2019-2024
Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2019-2024
Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2020-2024
Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2021-2024
Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2021-2024
Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2021-2024
Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2021-2024
Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2024-2029
Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2024-2029
Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2024-2029

Bath and Shower in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hygiene and sustainability concerns two big factors influencing demand
Dove remains perched on the top following brand relaunch while private label takes off with strong value positioning
Distribution remains focused on presenting the best value for the consumer

PROSPECTS AND OPPORTUNITIES

Body wash/shower gel set to be the main growth driver with a focus on new innovations
Skinification trend expected to inform new product development
Functional fragrances could elevate bath and shower experiences

CATEGORY DATA

- Table 22 - Sales of Bath and Shower by Category: Value 2019-2024
- Table 23 - Sales of Bath and Shower by Category: % Value Growth 2019-2024
- Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2019-2024
- Table 25 - NBO Company Shares of Bath and Shower: % Value 2020-2024
- Table 26 - LBN Brand Shares of Bath and Shower: % Value 2021-2024
- Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2021-2024
- Table 28 - Forecast Sales of Bath and Shower by Category: Value 2024-2029
- Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2024-2029
- Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2024-2029

Colour Cosmetics in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Colour cosmetics thriving with natural looks a key trend
A big year for Kiko and Cosnova as the leading players make significant gains
Beauty specialists capitalise on their wide range of products and services

PROSPECTS AND OPPORTUNITIES

Value, multifunctionality and the natural look
Social media likely to play a central role in shaping the future of colour cosmetics
Innovation expected to focus on sustainability, inclusivity and new technologies

CATEGORY DATA

- Table 31 - Sales of Colour Cosmetics by Category: Value 2019-2024
- Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2019-2024
- Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2020-2024
- Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2021-2024
- Table 35 - LBN Brand Shares of Eye Make-up: % Value 2021-2024
- Table 36 - LBN Brand Shares of Facial Make-up: % Value 2021-2024
- Table 37 - LBN Brand Shares of Lip Products: % Value 2021-2024
- Table 38 - LBN Brand Shares of Nail Products: % Value 2021-2024
- Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2021-2024
- Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2024-2029
- Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2024-2029

Deodorants in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sticks and sprays driving growth
Sodalco launches new range targeting pre-teen girls
E-commerce opening up new opportunities for deodorants

PROSPECTS AND OPPORTUNITIES

Sprays projected to remain the key growth driver backed by new innovations
Men's deodorants and products for intimate areas showing promise
Health and sustainability likely to be the focus of innovation

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2019-2024
Table 43 - Sales of Deodorants by Category: % Value Growth 2019-2024
Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2019-2024
Table 45 - NBO Company Shares of Deodorants: % Value 2020-2024
Table 46 - LBN Brand Shares of Deodorants: % Value 2021-2024
Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2021-2024
Table 48 - Forecast Sales of Deodorants by Category: Value 2024-2029
Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2024-2029
Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2024-2029

Depilatories in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Women's razors and blades the standout category as consumers look for convenience
Gillette cuts through the competition
Value and convenience key to distribution

PROSPECTS AND OPPORTUNITIES

Women's razors and blades set to be the focus of growth and development
Younger consumers represent a key consumer base for depilatories
Sustainability concerns expected to inform innovation and new product development

CATEGORY DATA

Table 51 - Sales of Depilatories by Category: Value 2019-2024
Table 52 - Sales of Depilatories by Category: % Value Growth 2019-2024
Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2020-2024
Table 54 - NBO Company Shares of Depilatories: % Value 2020-2024
Table 55 - LBN Brand Shares of Depilatories: % Value 2021-2024
Table 56 - Forecast Sales of Depilatories by Category: Value 2024-2029
Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2024-2029

Fragrances in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fragrances constantly evolving to meet the needs of Italians
L'Oréal leads with ongoing investment in new product development and innovation
Beauty specialists dominate but e-commerce making inroads for repeat purchases

PROSPECTS AND OPPORTUNITIES

Mood enhancing products and body mists expected to be important sales drivers
Youth in revolt as younger generations reject traditional values

Fragrances set to be a hotbed of innovation

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2019-2024

Table 59 - Sales of Fragrances by Category: % Value Growth 2019-2024

Table 60 - NBO Company Shares of Fragrances: % Value 2020-2024

Table 61 - LBN Brand Shares of Fragrances: % Value 2021-2024

Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2021-2024

Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2021-2024

Table 64 - Forecast Sales of Fragrances by Category: Value 2024-2029

Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2024-2029

[Hair Care in Italy](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mixed results for hair care with big wins for shampoos and styling agents

L'Oréal retains the lead but private label ramps up the competition

Health and personal care stores lead distribution but discounters gain share with strong value proposition

PROSPECTS AND OPPORTUNITIES

Healthy and sustainable products expected to see significant gains

Skinification trend expected to have a growing impact on hair care

New innovations set to play a key role in the future of hair care

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2019-2024

Table 67 - Sales of Hair Care by Category: % Value Growth 2019-2024

Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2019-2024

Table 69 - NBO Company Shares of Hair Care: % Value 2020-2024

Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2020-2024

Table 71 - LBN Brand Shares of Hair Care: % Value 2021-2024

Table 72 - LBN Brand Shares of Colourants: % Value 2021-2024

Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2021-2024

Table 74 - LBN Brand Shares of Styling Agents: % Value 2021-2024

Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2021-2024

Table 76 - Forecast Sales of Hair Care by Category: Value 2024-2029

Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2024-2029

Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2024-2029

[Men's Grooming in Italy](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

Men's fragrances remains central to the growth of men's grooming in Italy

Gillette remains the focus of innovation while Dior benefits from the popularity of men's fragrances

Men value convenience and variety when shopping for beauty and personal care

PROSPECTS AND OPPORTUNITIES

Bright outlook for men's grooming as men develop more sophisticated beauty and personal care routines

Gen Z set to play a key role in the category's future

Innovation set to drive growth and development within men's grooming

CATEGORY DATA

- Table 79 - Sales of Men's Grooming by Category: Value 2019-2024
- Table 80 - Sales of Men's Grooming by Category: % Value Growth 2019-2024
- Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2021-2024
- Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2021-2024
- Table 83 - NBO Company Shares of Men's Grooming: % Value 2020-2024
- Table 84 - LBN Brand Shares of Men's Grooming: % Value 2021-2024
- Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2021-2024
- Table 86 - Forecast Sales of Men's Grooming by Category: Value 2024-2029
- Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2024-2029

Oral Care in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Toothpaste driving the growth of oral care in Italy in 2024
- Players investing in innovation to stay ahead of the competition
- Consumers look for convenience and value when shopping for oral care products

PROSPECTS AND OPPORTUNITIES

- Increasing health awareness should spell good news for oral care
- Sustainability concerns influencing growth and development in oral care
- Private label expected to make further inroads in oral care

CATEGORY DATA

- Table 88 - Sales of Oral Care by Category: Value 2019-2024
- Table 89 - Sales of Oral Care by Category: % Value Growth 2019-2024
- Table 90 - Sales of Toothbrushes by Category: Value 2019-2024
- Table 91 - Sales of Toothbrushes by Category: % Value Growth 2019-2024
- Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2020-2024
- Table 93 - NBO Company Shares of Oral Care: % Value 2020-2024
- Table 94 - LBN Brand Shares of Oral Care: % Value 2021-2024
- Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2021-2024
- Table 96 - LBN Brand Shares of Toothpaste: % Value 2021-2024
- Table 97 - Forecast Sales of Oral Care by Category: Value 2024-2029
- Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2024-2029
- Table 99 - Forecast Sales of Toothbrushes by Category: Value 2024-2029
- Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029

Skin Care in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Increasing health awareness fuelling demand for skin care
- Competition heating up with L'Oréal remaining on top
- Consumers place their skin health in the hands of pharmacies

PROSPECTS AND OPPORTUNITIES

- Skin health will be a key focus of growth and development
- Innovation expected to focus on green initiatives and new technologies
- Scientific research turning up new opportunities for skin care

CATEGORY DATA

- Table 101 - Sales of Skin Care by Category: Value 2019-2024
- Table 102 - Sales of Skin Care by Category: % Value Growth 2019-2024
- Table 103 - NBO Company Shares of Skin Care: % Value 2020-2024
- Table 104 - LBN Brand Shares of Skin Care: % Value 2021-2024
- Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2021-2024
- Table 106 - LBN Brand Shares of Anti-agers: % Value 2021-2024
- Table 107 - LBN Brand Shares of Firming Body Care: % Value 2021-2024
- Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2021-2024
- Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2021-2024
- Table 110 - Forecast Sales of Skin Care by Category: Value 2024-2029
- Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2024-2029

Sun Care in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Growing awareness around skin health boosting sales of sun care
- Leading players focus on the importance of year-round sun protection
- Consumers turn to pharmacies for their sun care solutions

PROSPECTS AND OPPORTUNITIES

- Skin health concerns and rising temperatures should fuel demand for sun care
- Thriving tourism industry should boost sales
- Sustainability concerns likely to influence new product development

CATEGORY DATA

- Table 112 - Sales of Sun Care by Category: Value 2019-2024
- Table 113 - Sales of Sun Care by Category: % Value Growth 2019-2024
- Table 114 - NBO Company Shares of Sun Care: % Value 2020-2024
- Table 115 - LBN Brand Shares of Sun Care: % Value 2021-2024
- Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2021-2024
- Table 117 - Forecast Sales of Sun Care by Category: Value 2024-2029
- Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2024-2029

Premium Beauty and Personal Care in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Consumers show willingness to invest in premium products again
- L'Oréal leads but MEDSPA making waves with Miamo
- Consumers looking to make more ethical and informed decisions

PROSPECTS AND OPPORTUNITIES

- Premium beauty and personal care set for steady growth as economy improves
- Dermocosmetics set to have a growing influence on the market
- Premium skin care and hair care set to be a focus of innovation

CATEGORY DATA

- Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2019-2024
- Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2019-2024
- Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2020-2024

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2021-2024

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2024-2029

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2024-2029

Mass Beauty and Personal Care in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

A positive year for mass beauty and personal care with consumers keen to experiment with new products

L'Oréal remains on top but Cosnova continues to take significant strides with another dynamic year

Consumers look for innovative and sustainable products at affordable prices

PROSPECTS AND OPPORTUNITIES

Bright outlook for the mass segment with body mists proving popular

Sustainability set to play an increasingly central role in the market

Premium features at mass market prices

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2019-2024

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2020-2024

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2021-2024

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2024-2029

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-italy/report.