

We personally care



Cosmetics Europe
the personal care association

MARKET PERFORMANCE 2017

European Cosmetic, Toiletry & Perfumery Data

Graphs

- Page 3 Value comparison of Europe, and other major markets - USA, Japan, China, Brazil, South Korea and India in 2017
- Page 4 Extra Import from US, Japan and China
- Page 5 Total retail value of the EU cosmetics industry
- Page 6 Market volume by country
- Page 7 Number of SMEs per country
- Page 8 European C&T market: Annual growth 2015-2017, RSP and % growth
- Page 9 European C&T market 2017: Market changes in Euros 2017/2016
- Page 10 European C&T market 2017: Annual per capita consumption by country
- Page 11 European C&T market 2017: Market changes by product category
- Page 12 European C&T market 2017: Market share by product category
- Page 13 Extra EU28 export
- Page 14 Total Export EU28
- Page 15 Employment: Total and by gender
- Page 16 Employment: Direct and indirect employees
- Page 17 Employment overview

Tables

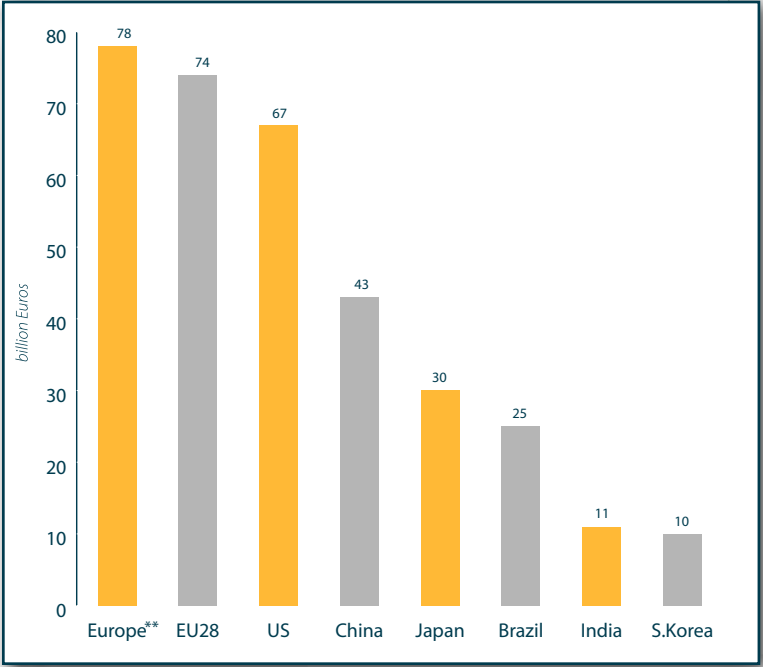
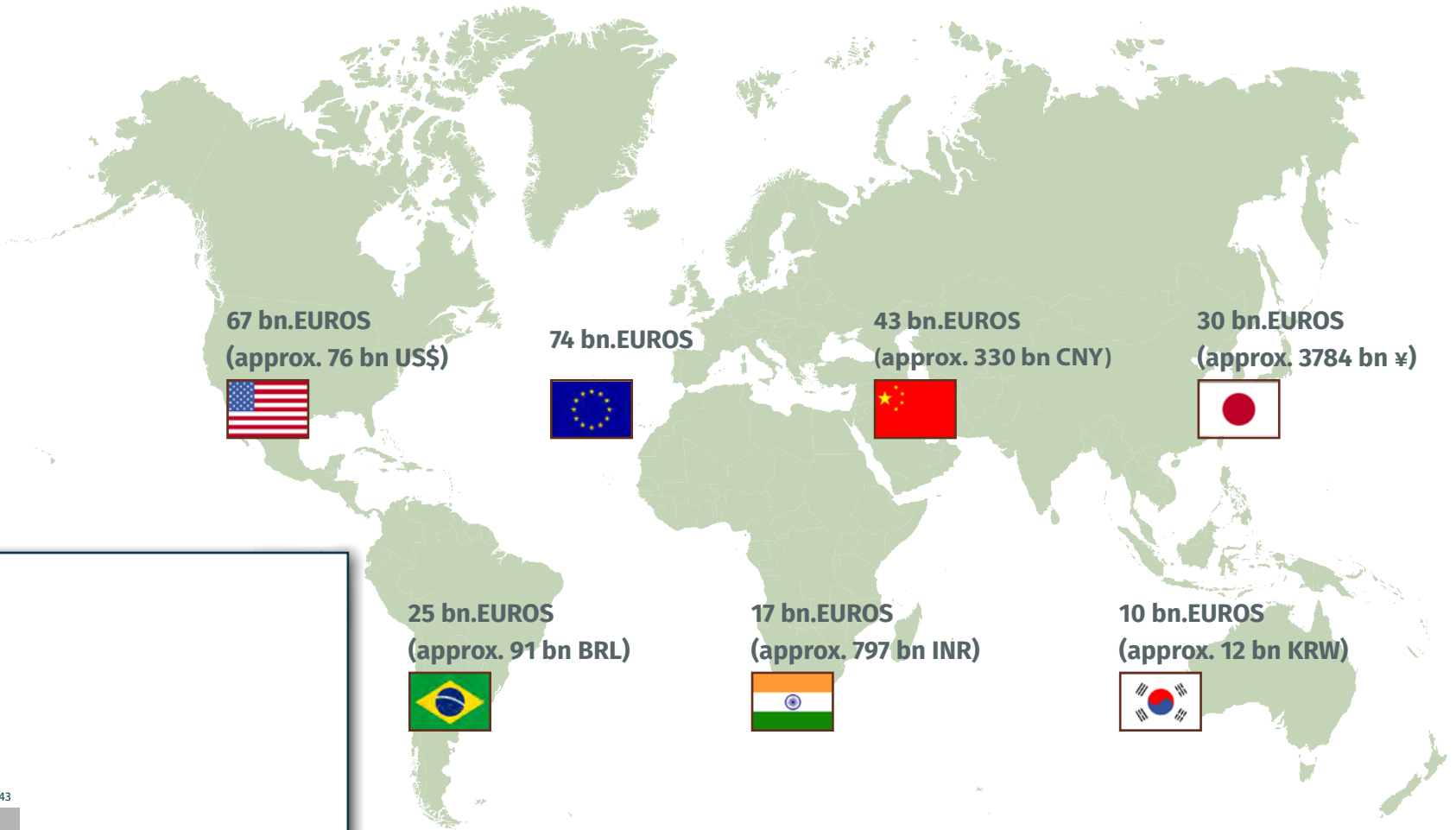
- Page 18 European C&T market 2015-2017: Basic data in national currency
- Page 19 European C&T market 2015-2017: Market volume by country (RSP)
- Page 20 European C&T market 2015-2017: Market volume by country (MSP)
- Page 21 European C&T market 2017: National markets by product category (RSP)
- Page 22 European C&T market 2017: National markets by product category (MSP)
- Page 23 European C&T market 2017: National markets by product category structure (RSP)
- Page 24 European C&T market 2017: National markets by product category structure (MSP)
- Page 25 European C&T market 2017: Product category structure by country (%) (RSP)
- Page 26 European C&T market 2017: Product category structure by country (RSP)
- Page 27 European C&T market 2017: Product category structure by country % (MSP)
- Page 28 European C&T market 2017: Product category structure by country (MSP)
- Page 29 European C&T market 2017: Changes in national markets by product category
- Page 30 European C&T market 2017: Changes in national markets by product category
- Page 31 European C&T market 2015-2017: Per capita consumption by country (RSP)
- Page 32 Population 2015-2017 by country
- Page 33 Gross domestic product 2015-2017 by country
- Page 34 Exchange rates 2015-2017 by country

* C&T = Cosmetics & Toiletries

Please note that the difference in some values is due to the nomenclature used (based on NA CE indicators as per the Cosmetics Europe statutes) and on the data source used.

EUROPEAN INDUSTRY MARKET SHARE vs GLOBAL PERSPECTIVE

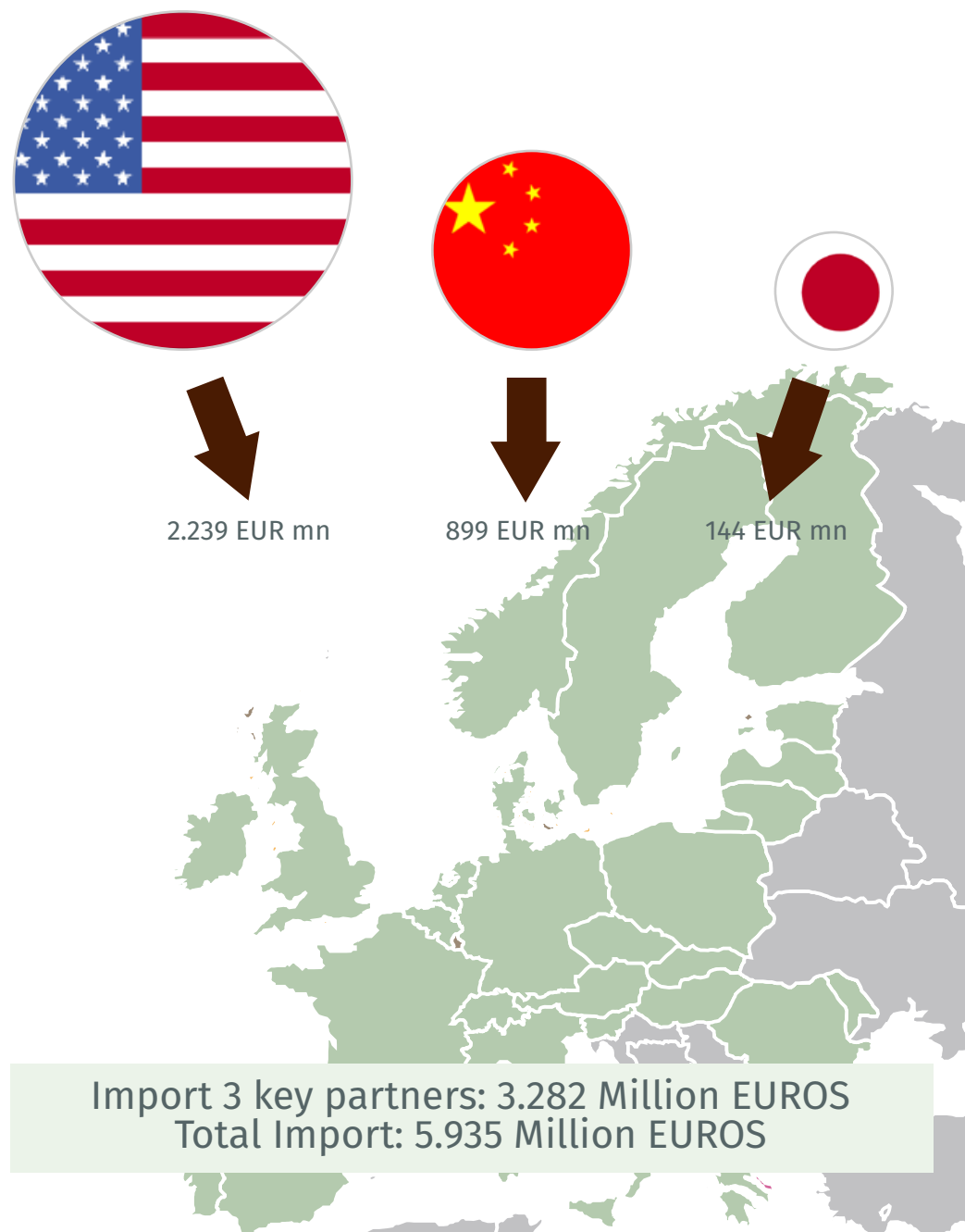
Value comparison of Europe, and other major markets - USA, Japan, China, Brazil, South Korean and India in 2017
Retail sales prices (RSP) in bn Euros*

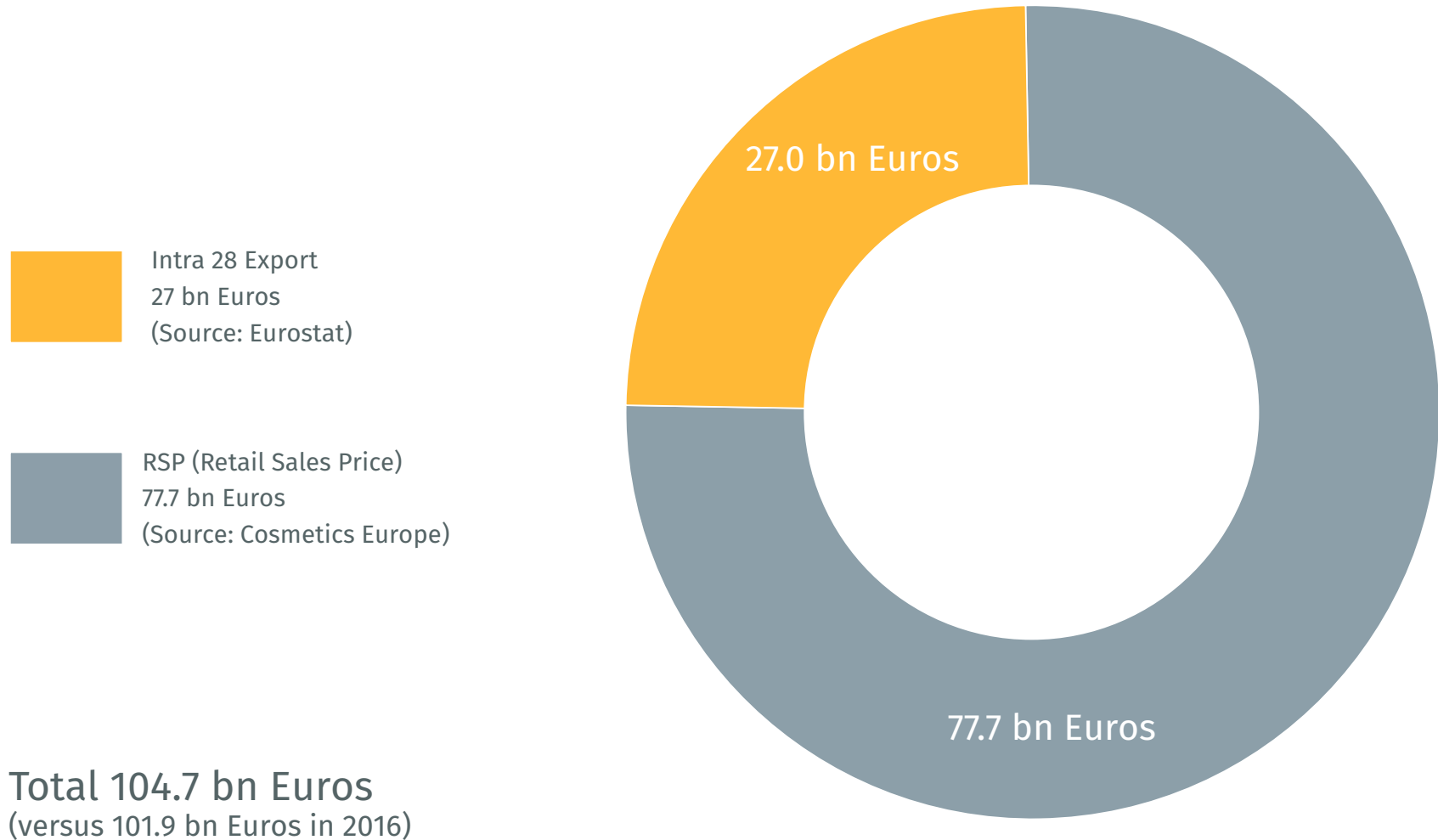


* MSP Source: Kline & Company Inc. (USA), Japan Cosmetic Industry Association (JCIA), Japan Dentifrice Manufacturers' Association (JDMA), Japan Soap and Detergent Association (JSDA), China, Brazil, India, S.Korea, (Euromonitor) according to Cosmetics Europe product nomenclature, assuming a MSP/RSP conversion factor of 1,6

** EU 28 + Norway and Switzerland estimated 78 bn EUR in 2017

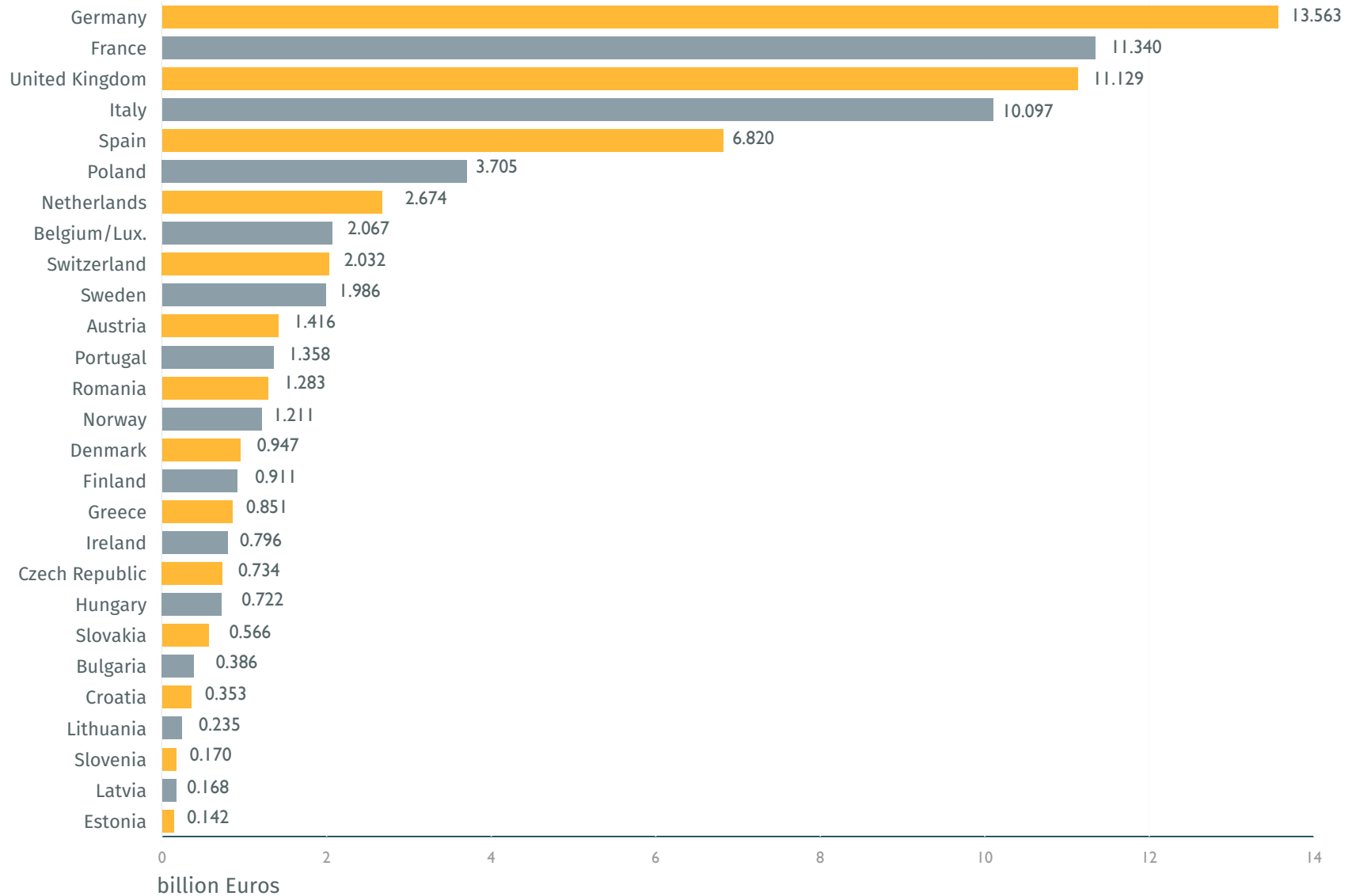
	CHINA	JAPAN	USA
Austria	2.3	0.0	8.5
Belgium	54.3	11.1	162.0
Bulgaria	1.5	0.0	0.9
Croatia	0.4	0.0	1.5
Cyprus	0.9	0.0	1.8
Czech Republic	5.0	0.3	20.5
Denmark	11.0	0.3	35.5
Estonia	0.9	0.3	2.7
Finland	1.5	0.2	8.1
France	61.5	54.9	277.0
Germany	98.7	41.0	289.0
Greece	9.2	0.0	6.5
Hungary	2.1	0.1	5.2
Ireland	7.4	0.0	14.1
Italy	39.8	1.2	50.4
Latvia	3.6	0.0	0.9
Lithuania	0.7	0.1	3.8
Luxembourg	0.1	0.0	0.8
Malta	0.3	0.0	1.2
Netherlands	106.9	3.6	394.3
Poland	49.3	0.5	23.1
Portugal	0.2	0.0	0.6
Romania	5.1	0.0	3.6
Slovakia	0.5	0.0	0.4
Slovenia	1.0	0.0	5.4
Spain	60.6	2.9	56.1
Sweden	9.1	0.4	53.4
UK	342.6	18.3	700.5
Switzerland	13.1	4.1	50.1
Norway	9.7	4.3	60.9
Europe 30	899.1	143.6	2,238.6





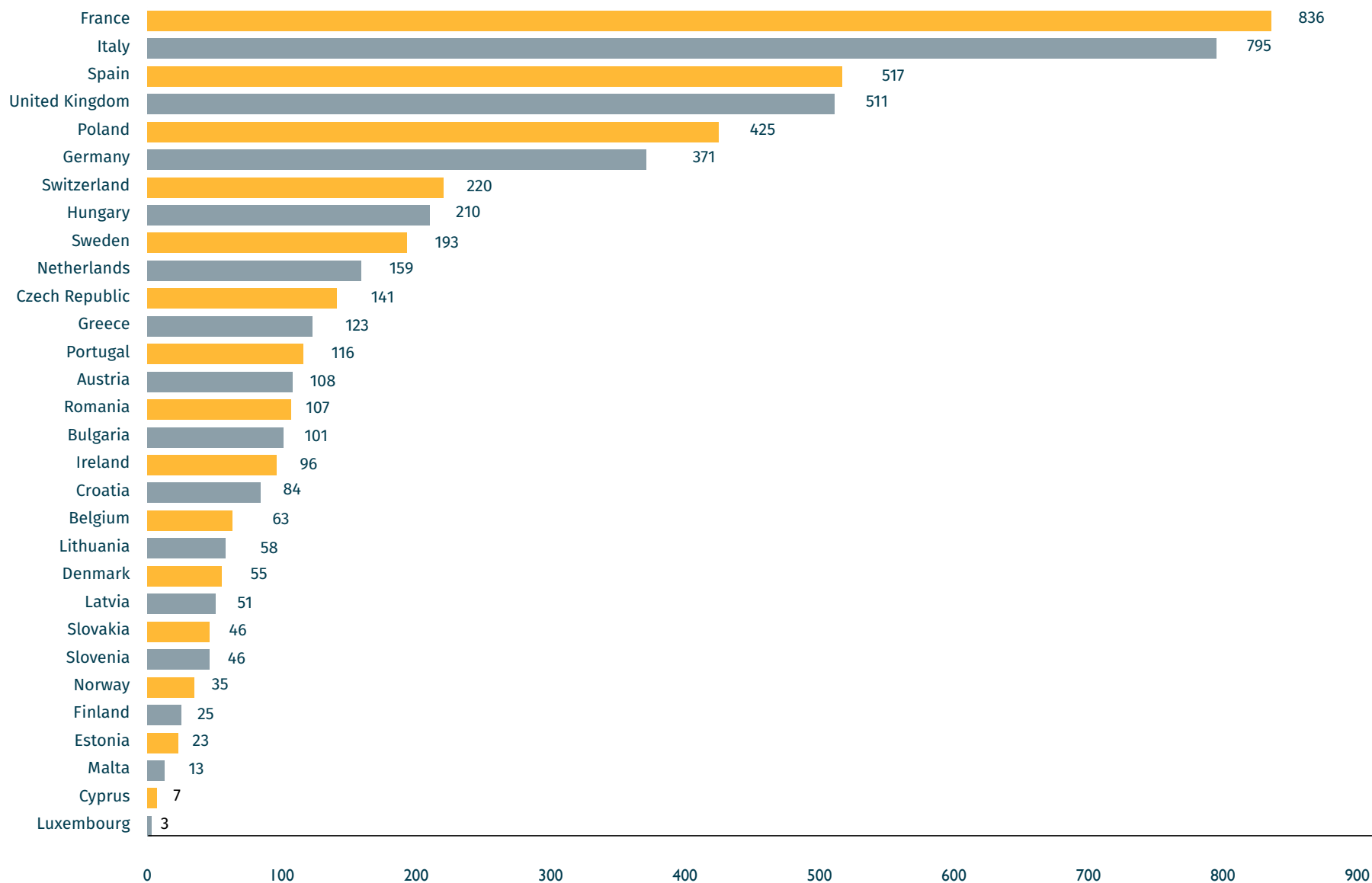
MARKET VOLUME IN EUROS BY COUNTRY 2017

Retail sales prices (RSP) in bn Euros



Total Europe*: 77.656 bn Euros
Total EU: 74.414 bn Euros

*Europe = EU28 Norway and Switzerland
Source: Cosmetics Europe

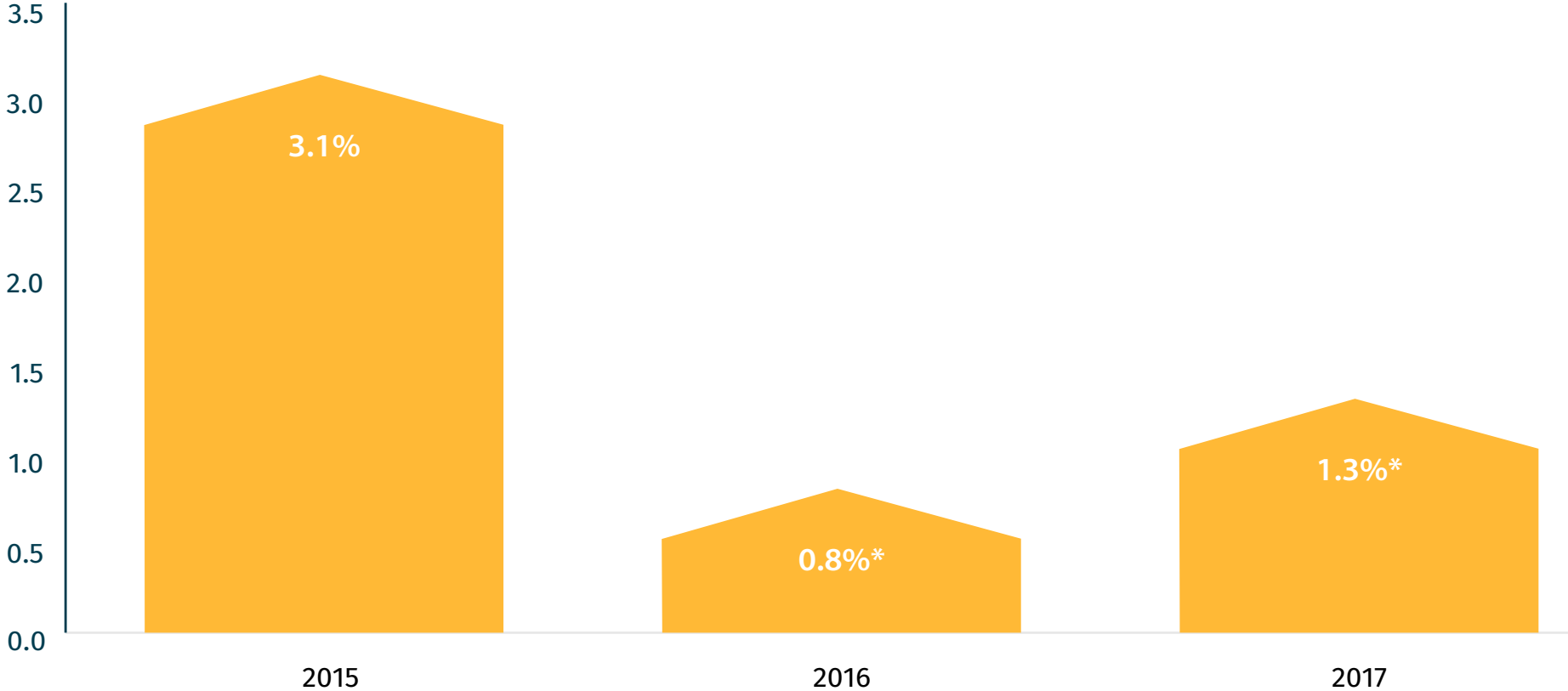


Total of 5,538 SMEs in Europe*

*Europe = EU28 Norway and Switzerland
Source: Euromonitor International

EUROPEAN C&T MARKET: ANNUAL GROWTH 2015-2017

Retail Sales Price (RSP) in bn Euros and % growth

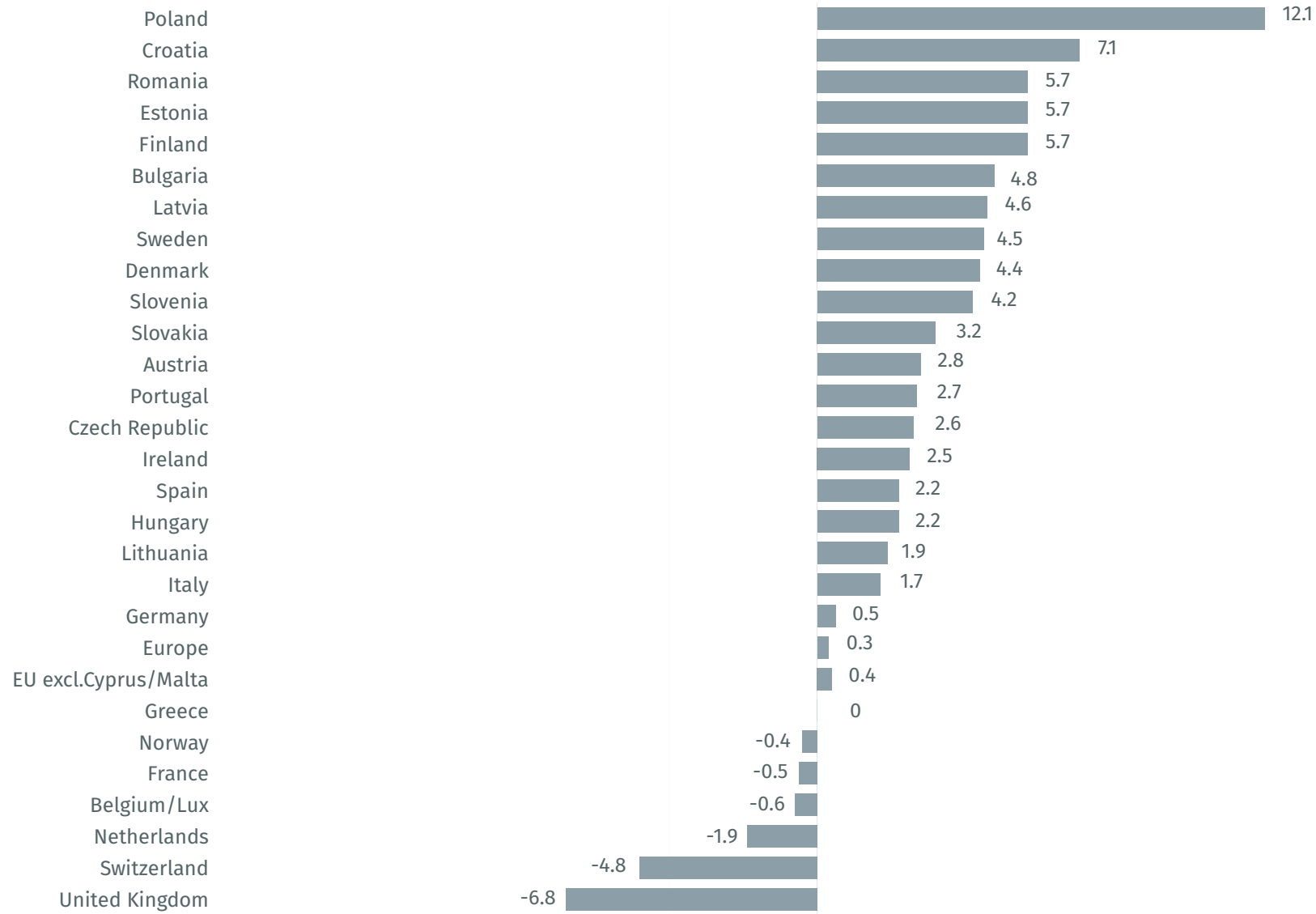


* Including monetary adjustments

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2017: MARKET CHANGES IN EUROS 2017/2016 (%)

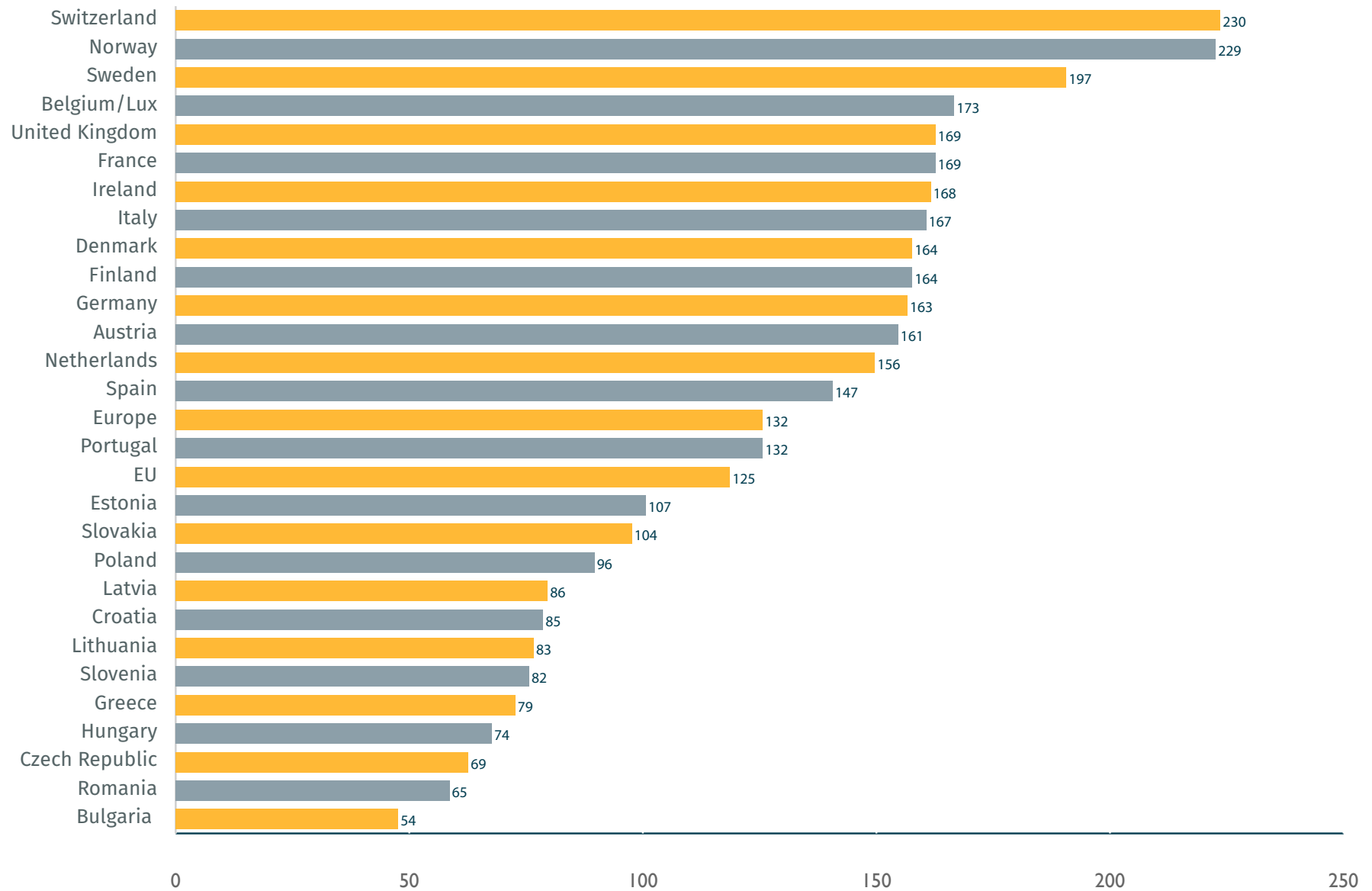
Retail Sales Price (RSP) in Euros



Source: Cosmetics Europe

EUROPEAN C&T MARKET 2017: PER CAPITA CONSUMPTION BY COUNTRY

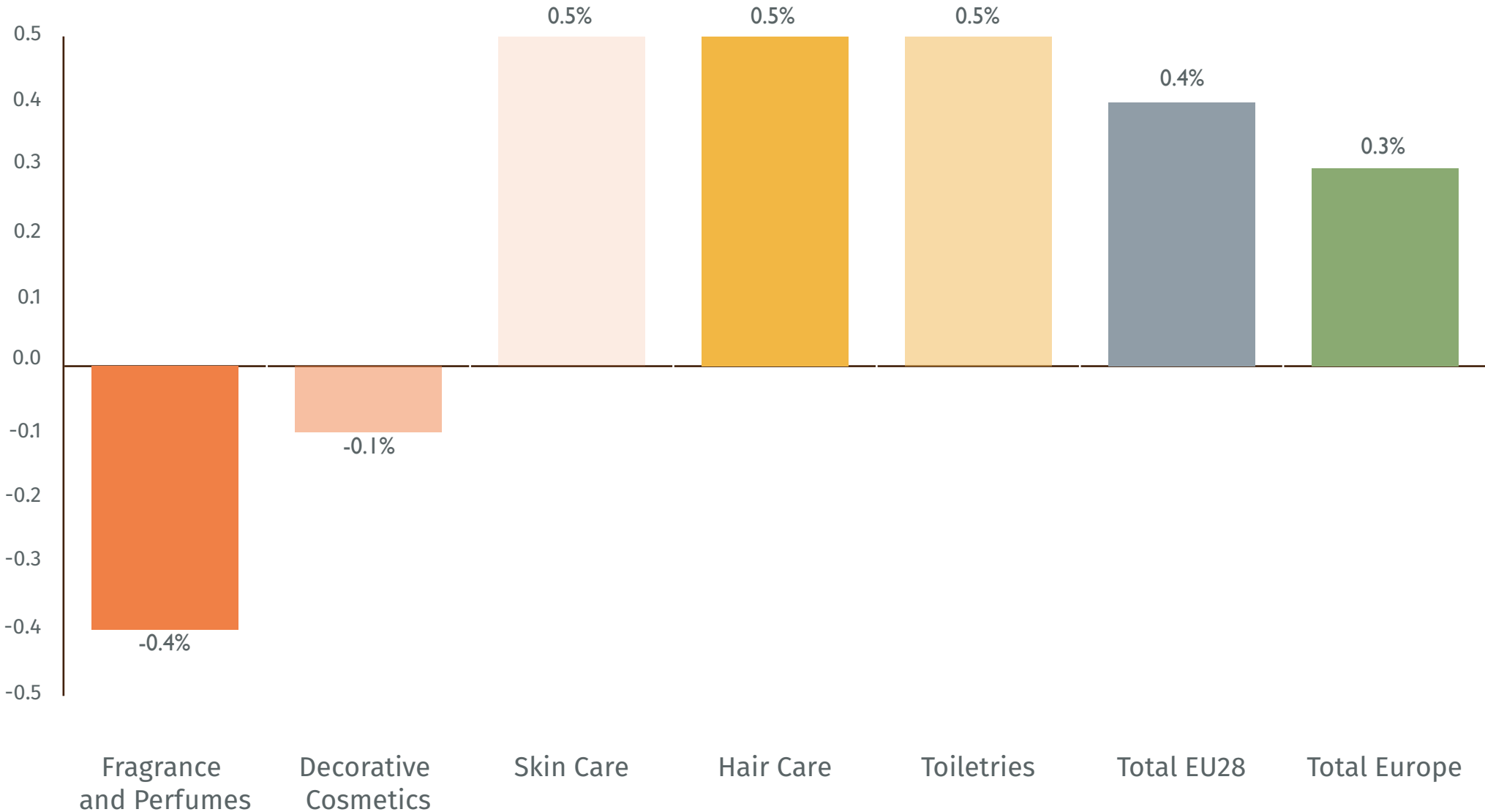
Retail Sales Price (RSP) in Euros



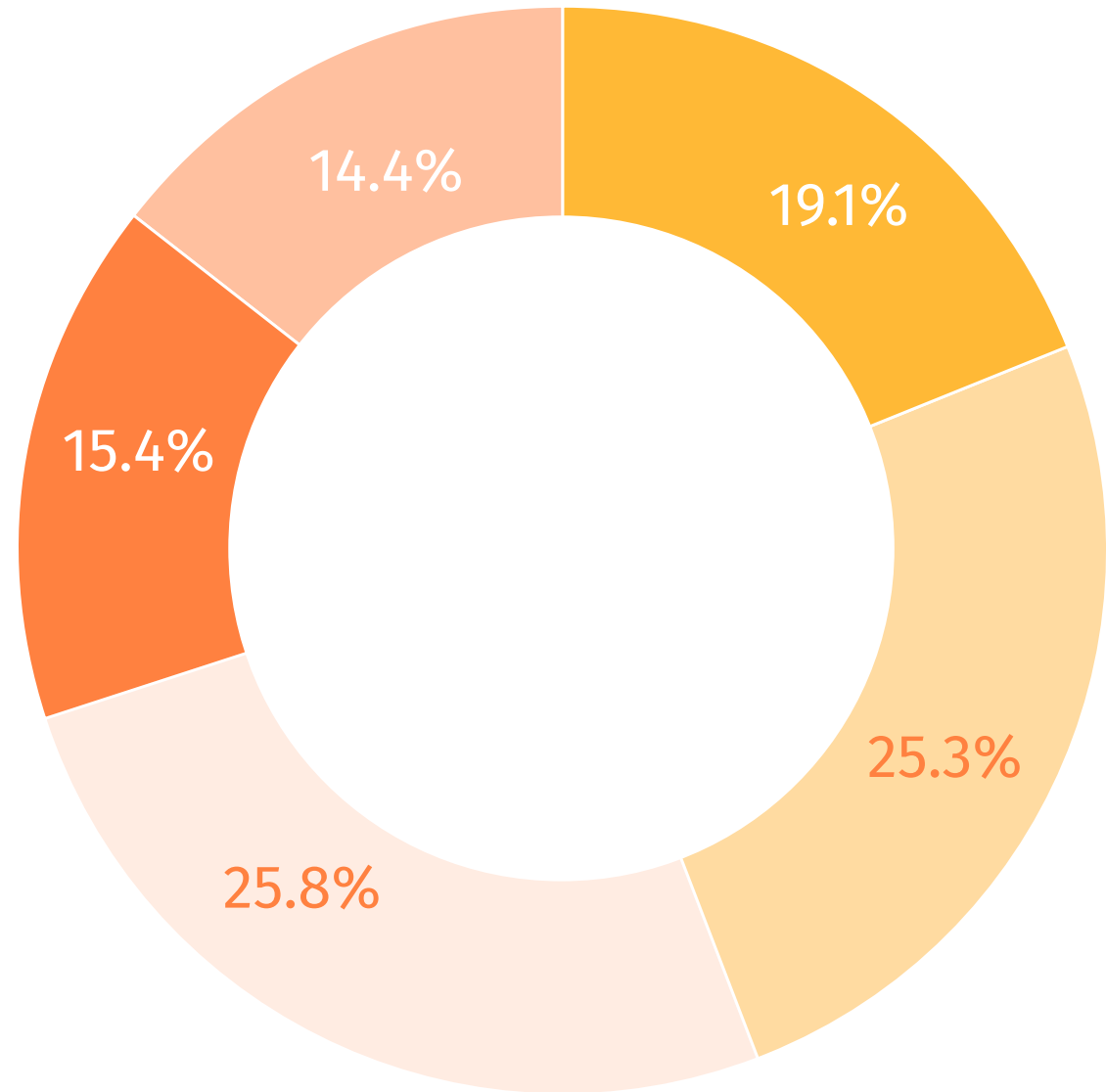
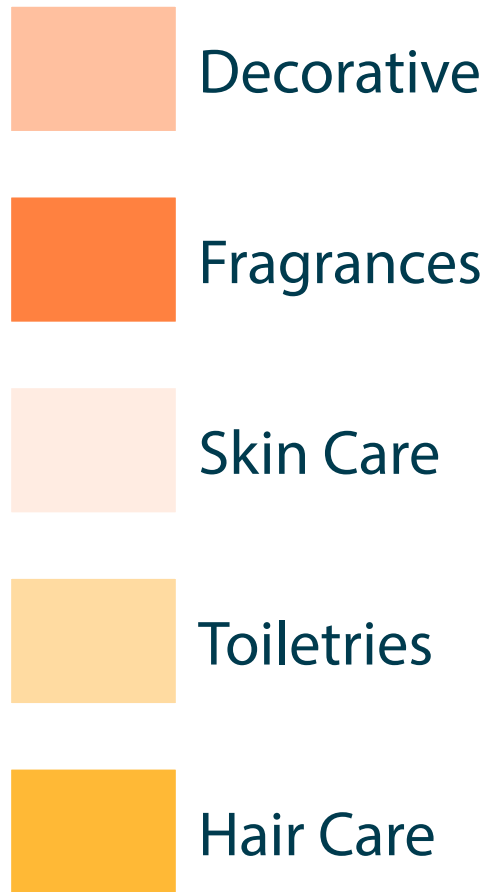
Source: Cosmetics Europe, Euromonitor International

EUROPEAN C&T MARKET 2017: MARKET CHANGES BY PRODUCT CATEGORY (%)

Retail Sales Price (RSP) in Euros



Source: Cosmetics Europe

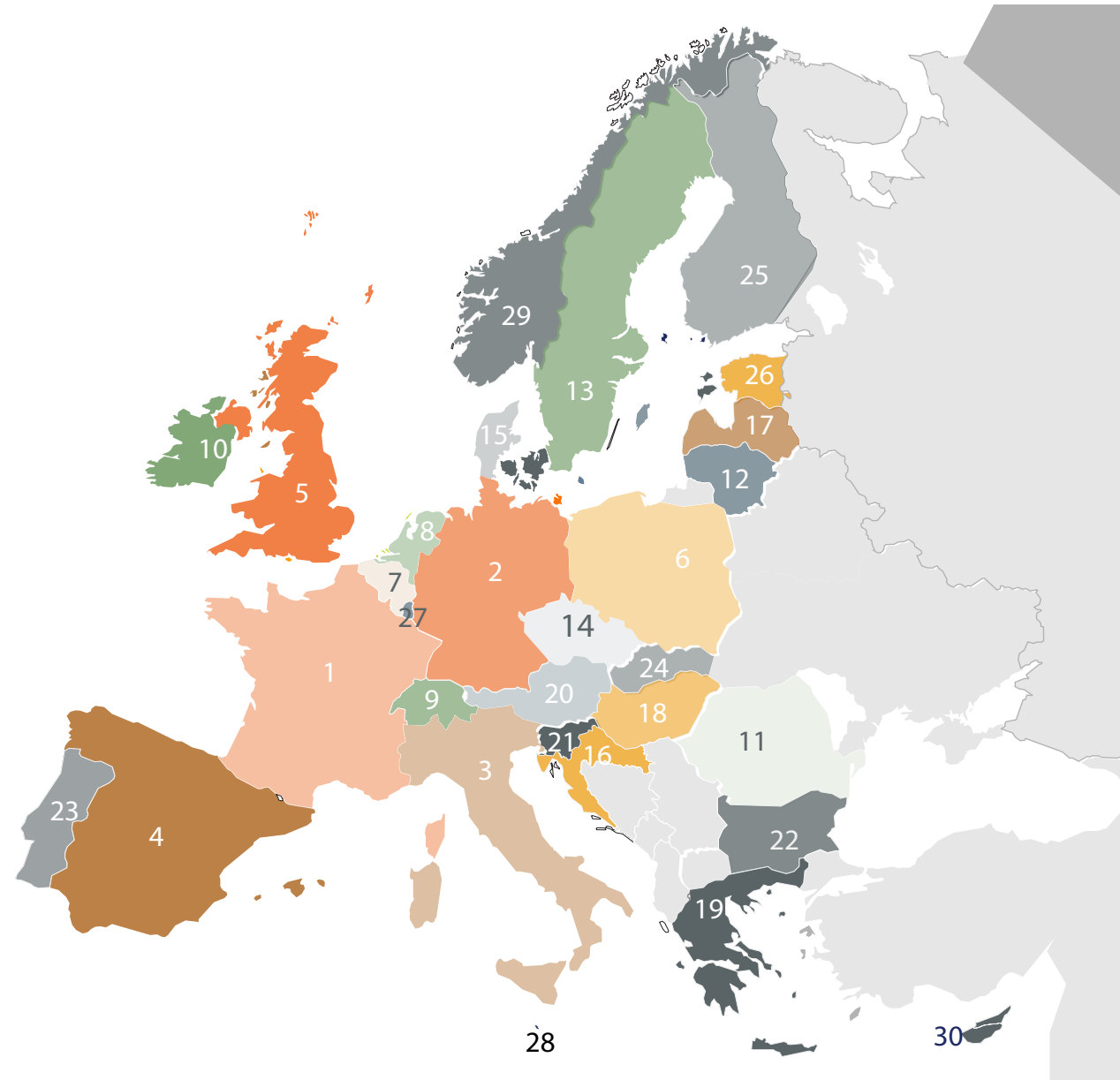


Source: Cosmetics Europe

EXTRA EUROPE 30 EXPORT

European C&T export in 2017: 20.2 billion* - The European market represented almost one third of the global market

Country	2016
1. France	7,231.7
2. Germany	2,906.6
3. Italy	1,903.2
4. Spain	1,751.5
5. UK	1,351.3
6. Poland	1,057.7
7. Belgium	1,025.0
8. Netherlands	667.3
9. Switzerland	646.6
10. Ireland	243.4
11. Romania	200.4
12. Lithuania	189.9
13. Sweden	188.3
14. Czech Republic	136.8
15. Denmark	135.2
16. Croatia	82.1
17. Latvia	72.3
18. Hungary	64.4
19. Greece	59.4
20. Austria	55.4
21. Slovakia	46.2
22. Bulgaria	41.0
23. Portugal	37.6
24. Slovakia	32.5
25. Finland	28.1
26. Estonia	26.7
27. Luxembourg	10.3
28. Malta	3.7
29. Norway	2.5
30. Cyprus	1.7
EUROPE 30	20,198.8 EUR mn

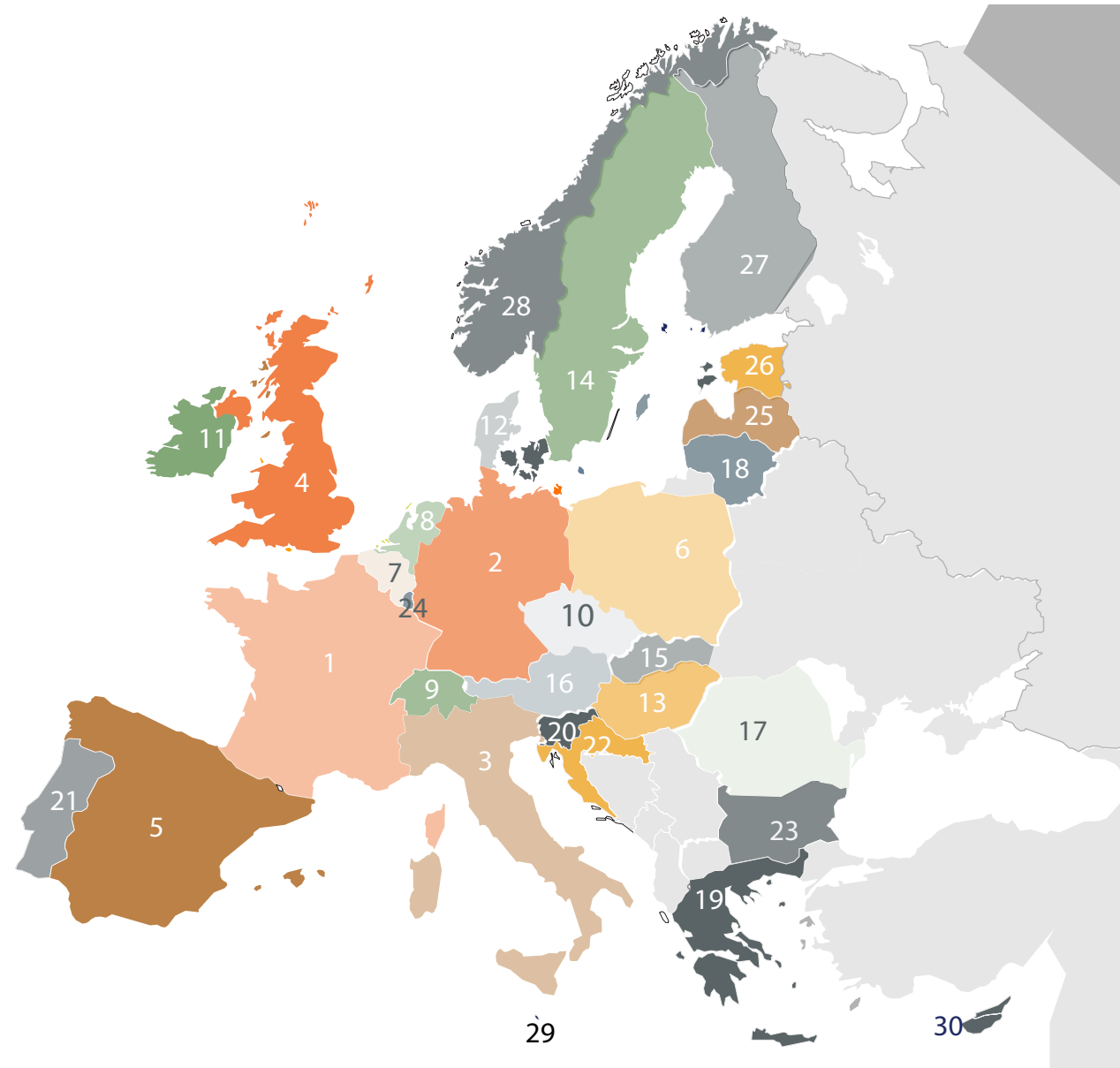


*Value Retail RSP, EUR bn; includes; Decorative cosmetics, Hair care, Fragrances, Skin care and Toiletries
 Source: Cosmetics Europe, Euromonitor International

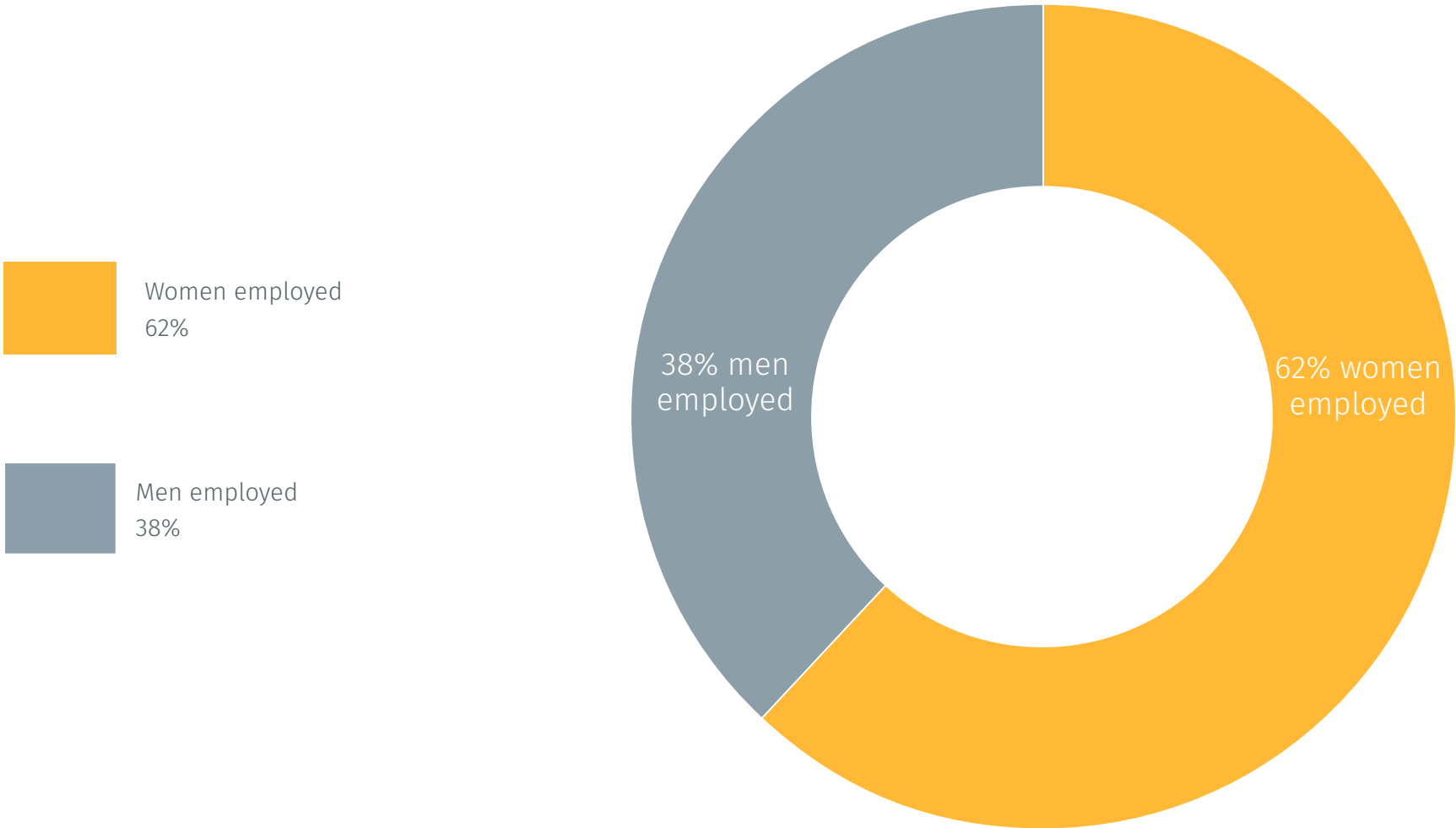
TOTAL EXPORT EUROPE 30

European C&T export in 2017: EUR 47.8 billion* - The European market represented almost one third of the global market

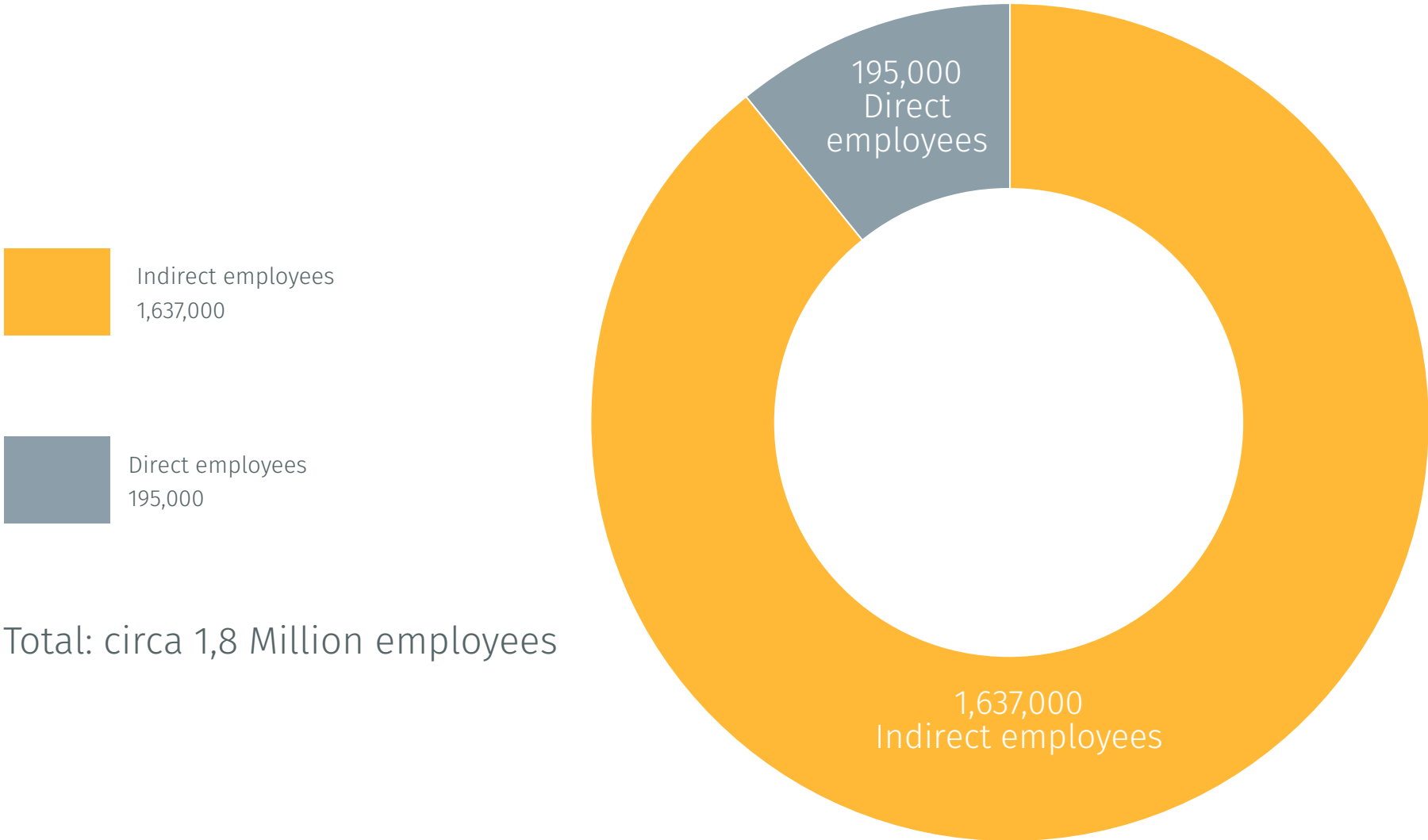
Country	2016
1. France	13,314.4
2. Germany	7,494.1
3. Italy	4,527.9
4. UK	4,133.6
5. Spain	3,350.4
6. Poland	2,950.0
7. Belgium	2,761.7
8. Netherlands	2,695.5
9. Switzerland	1,350.9
10. Czech Republic	774.0
11. Ireland	516.6
12. Denmark	438.0
13. Hungary	424.6
14. Sweden	393.4
15. Slovakia	386.4
16. Austria	339.7
17. Romania	332.3
18. Lithuania	247.1
19. Greece	218.6
20. Slovenia	207.8
21. Portugal	164.2
22. Croatia	160.0
23. Bulgaria	153.9
24. Luxembourg	146.7
25. Latvia	123.0
26. Estonia	68.1
27. Finland	26.1
28. Norway	27.0
29. Malta	8.1
30. Cyprus	7.4
EUROPE 30	47,771.5 EUR mn



*Value Retail RSP, EUR bn; includes; Decorative cosmetics, Hair care, Fragrances, Skin care and Toiletries
 Source: Cosmetics Europe, Euromonitor International



Source: Cosmetics Europe



Total: circa 1,8 Million employees

Source: Cosmetics Europe



In 2017 the European cosmetics industry employs approximately 1,800,000 people including: 28,000 scientists

There are 530,000 life sciences students in Europe

Source: Euromonitor International

EUROPEAN C&T MARKET 2015-2017:

Basic data in national currency* - Retail Sales Prices (RSP) & Manufacturing/ex-factory Sales Prices (MSP)

Countries	National Currencies	2015 billion		2016 billion		2017 billion		2017/16 +/- %	
		RSP	MSP	RSP	MSP	RSP	MSP	RSP	MSP
Austria	€	1.346	0.841	1.376	0.863	1.416	0.885	2.8	2.5
Belgium/Lux.	€	2.057	1.141	2.080	1.163	2.067	1.154	-0.6	-0.7
Bulgaria	BGN	0.650	0.411	0.720	0.467	0.754	0.491	4.8	5.2
Croatia	HRK	2.469	1.436	2.477	1.441	2.630	0.491	6.2	4.0
Czech Republic	CZK	19.244	12.300	19.334	12.084	19.357	12.098	0.1	0.1
Denmark	DKK	7.902	3.943	6.747	3.525	7.045	3.668	4.4	4.1
Estonia	€ 2012	0.120	0.063	0.125	0.070	0.142	0.080	5.7	6.0
Finland	€	0.912	0.447	0.862	0.431	0.911	0.456	5.7	5.8
France	€	11.357	6.444	11.392	6.904	11.340	6.854	-0.5	-0.7
Germany	€	13.388	8.395	13.603	8.776	13.563	8.750	0.5	0.5
Greece	€	0.804	0.600	0.798	0.593	0.851	0.638	-0.0	-0.1
Hungary	HUF	211.547	110.671	219.751	130.604	222.866	137.060	1.4	4.9
Ireland	€	0.756	0.417	0.777	0.468	0.796	0.479	2.5	2.5
Italy	€	9.706	6.145	9.890	6.320	10.097	6.271	1.7	-0.9
Latvia	LVL	0.155	0.077	0.160	0.084	0.168	0.087	4.6	3.6
Lithuania	LTL	0.697	0.341	0.814	0.426	0.813	0.423	1.9	1.7
Netherlands	€	2.859	1.580	2.783	1.555	2.674	1.499	-1.9	-1.9
Poland	PLN	12.819	8.147	14.425	9.423	15.807	10.590	9.6	12.4
Portugal	€	1.289	0.795	1.322	0.822	1.358	0.841	2.7	2.3
Romania	RON	5.279	2.751	5.448	3.174	5.847	3.367	7.3	6.1
Slovakia	€	0.531	0.316	0.548	0.333	0.566	0.342	0.0	0.0
Slovenia	EUR	0.165	0.094	0.163	0.094	0.170	0.096	4.2	2.2
Spain	€	6.447	4.002	6.657	4.180	6.820	4.270	2.2	2.2
Sweden	SEK	18.256	9.362	17.991	10.292	19.025	10.826	5.8	5.2
United Kingdom	GBP	9.102	4.656	9.379	5.211	9.769	5.427	-0.1	-0.1
Norway	NOK	10.725	5.276	10.965	5.492	11.295	5.657	3.0	3.0
Switzerland	CHF	2.409	1.523	2.323	1.434	2.256	1.392	-2.9	-2.9

* Professional hair care included

Source: Cosmetics Europe and Euromonitor International

EUROPEAN C&T MARKET 2015-2017:

Market volume by country (RSP)

Country	2015 billion EUROS	2016 billion EUROS	2017 billion EUROS	17/16 +/- %	2017 % share
Germany	13.388	13.499	13.563	0.5	17.5
France	11.357	11.392	11.340	-0.5	14.6
United Kingdom	12.911	11.937	11.129	-6.8	14.3
Italy	9.846	9.926	10.097	1.7	13.0
Spain	6.465	6.675	6.820	2.2	8.8
Netherlands	2.794	2.727	2.674	-1.9	3.4
Poland	3.064	3.306	3.705	12.1	4.8
Belgium/Lux	2.057	2.080	2.067	-0.6	2.7
Sweden	1.952	1.900	1.986	4.5	2.6
Portugal	1.289	1.322	1.358	2.8	1.7
Austria	1.346	1.376	1.416	2.7	1.8
Denmark	1.059	0.907	0.947	4.4	1.2
Greece	0.804	0.851	0.851	-0.0	1.1
Finland	0.870	0.862	0.911	5.7	1.2
Romania	1.188	1.213	1.283	5.7	1.7
Czech Republic	0.705	0.715	0.734	2.6	0.9
Hungary	0.682	0.706	0.722	2.2	0.9
Ireland	0.756	0.777	0.796	2.5	1.0
Slovakia	0.531	0.548	0.566	3.2	0.7
Croatia	0.328	0.329	0.353	7.1	0.5
Bulgaria	0.332	0.368	0.386	1.9	19.0
Lithuania	0.198	0.231	0.235	1.9	0.3
Slovenia	0.165	0.163	0.170	4.2	0.2
Latvia	0.155	0.160	0.168	4.6	0.2
Estonia	0.128	0.134	0.142	5.7	0.2
EU (excluding Malta/Cyprus)	74.369	74.106	74.414	0.4	95.8
Switzerland	2.265	2.134	2.032	-4.8	2.6
Norway	1.172	1.215	1.211	-0.4	1.6
Europe	77.806	77.455	77.657	0.3	100.0

Source: Cosmetics Europe

Country	2015 billion EUROS	2016 billionEUROS	2017 billion EUROS	17/16 +/- %	2017 % share
Germany	8.637	8.709	8.750	0.5	18.6
France	6.886	6.904	6.854	-0.7	14.6
Italy	6.288	6.326	6.271	-0.9	13.3
United Kingdom	7.173	6.632	6.183	-6.8	13.1
Spain	4.030	4.180	4.270	2.2	9.1
Poland	2.021	2.160	2.482	14.9	5.3
Netherlands	1.566	1.527	1.499	-1.9	3.2
Belgium/Lux	1.150	1.163	1.154	-0.7	2.5
Sweden	1.117	1.087	1.130	4.0	2.4
Portugal	0.803	0.822	0.841	2.3	1.8
Austria	0.842	0.863	0.885	2.5	1.9
Greece	0.598	0.639	0.638	-0.1	1.4
Denmark	0.552	0.474	0.493	4.1	1.0
Romania	0.680	0.707	0.738	4.5	1.6
Czech Republic	0.441	0.447	0.459	2.6	1.0
Finland	0.435	0.431	0.456	5.8	1.0
Ireland	0.456	0.468	0.479	2.5	1.0
Hungary	0.383	0.420	0.444	5.8	0.9
Slovakia	0.323	0.333	0.342	2.5	0.7
Croatia	0.191	0.191	0.201	5.0	0.4
Bulgaria	0.216	0.239	0.251	2.5	0.5
Lithuania	0.104	0.121	0.123	5.2	0.3
Slovenia	0.095	0.094	0.096	1.7	0.2
Latvia	0.082	0.084	0.088	3.7	0.2
Estonia	0.071	0.076	0.080	6.0	0.2
EU (excluding Malta/Cyprus)	45.137	45.094	45.205	0.2	96.0
Switzerland	1.397	1.318	1.254	-4.8	2.7
Norway	0.587	0.609	0.606	-0.4	1.3
Europe	47.121	47.020	47.065	0.1	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2017:
National markets by product category (billion) Euros / RSP basis

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1.611	1.842	3.093	2.959	4.058	13.563
France	2.208	1.440	3.456	1.626	2.608	11.340
United Kingdom	2.055	1.827	2.624	1.948	2.675	11.129
Italy	1.239	1.590	2.796	1.831	2.642	10.097
Spain	1.313	0.670	1.908	1.278	1.651	6.820
Netherlands	0.392	0.425	0.569	0.550	0.738	2.674
Poland	0.538	0.479	0.927	0.747	1.014	3.705
Belgium/Lux	0.388	0.252	0.523	0.518	0.387	2.067
Sweden	0.174	0.566	0.532	0.375	0.339	1.986
Greece	0.080	0.081	0.274	0.210	0.206	0.851
Austria	0.203	0.215	0.365	0.275	0.358	1.416
Portugal	0.230	0.098	0.386	0.236	0.408	1.358
Denmark	0.132	0.159	0.226	0.231	0.200	0.947
Romania	0.303	0.173	0.271	0.220	0.316	1.283
Czech Republic	0.094	0.114	0.169	0.169	0.188	0.734
Finland	0.035	0.164	0.217	0.311	0.186	0.911
Hungary	0.110	0.090	0.131	0.119	0.273	0.722
Ireland	0.126	0.117	0.167	0.165	0.221	0.796
Slovakia	0.090	0.081	0.125	0.105	0.164	0.566
Bulgaria	0.059	0.053	0.080	0.084	0.109	0.386
Croatia	0.045	0.053	0.101	0.050	0.104	0.353
Lithuania	0.051	0.037	0.057	0.041	0.050	0.235
Slovenia	0.020	0.022	0.054	0.031	0.043	0.170
Latvia	0.035	0.019	0.040	0.040	0.034	0.168
Estonia	0.023	0.020	0.039	0.027	0.033	0.142
EU (excluding Malta/Cyprus)	11.553	10.584	19.129	14.146	19.002	74.414
Switzerland	0.317	0.318	0.622	0.439	0.337	2.032
Norway	0.063	0.264	0.322	0.258	0.305	1.211
Europe	11.933	11.166	20.072	14.842	19.643	77.656

Source: Cosmetics Europe

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1.039	1.188	1.995	1.909	2.618	8.750
France	1.253	0.866	2.060	1.017	1.659	6.855
United Kingdom	0.769	0.987	1.737	1.137	1.641	6.272
Italy	1.142	1.015	1.458	1.082	1.486	6.183
Spain	0.827	0.423	1.197	0.790	1.034	4.271
Netherlands	0.197	0.209	0.325	0.355	0.412	1.498
Poland	0.317	0.321	0.629	0.498	0.717	2.482
Belgium/Lux	0.221	0.130	0.277	0.289	0.237	1.154
Sweden	0.053	0.060	0.196	0.150	0.179	0.638
Greece	0.088	0.318	0.295	0.222	0.208	1.130
Austria	0.120	0.138	0.231	0.172	0.224	0.885
Portugal	0.136	0.061	0.239	0.148	0.257	0.841
Denmark	0.066	0.083	0.117	0.120	0.107	0.493
Romania	0.166	0.104	0.159	0.122	0.189	0.738
Czech Republic	0.059	0.071	0.105	0.106	0.118	0.459
Finland	0.018	0.082	0.108	0.155	0.093	0.456
Hungary	0.063	0.050	0.092	0.070	0.169	0.444
Ireland	0.066	0.070	0.101	0.103	0.140	0.479
Slovakia	0.055	0.049	0.076	0.062	0.100	0.342
Bulgaria	0.038	0.034	0.052	0.056	0.071	0.251
Croatia	0.024	0.030	0.057	0.029	0.061	0.201
Lithuania	0.024	0.018	0.028	0.024	0.029	0.123
Slovenia	0.010	0.013	0.030	0.017	0.025	0.096
Latvia	0.017	0.010	0.021	0.021	0.018	0.088
Estonia	0.011	0.012	0.022	0.016	0.019	0.080
EU (excluding Malta/Cyprus)	6.777	6.341	11.607	8.671	11.811	45.207
Switzerland	0.167	0.227	0.345	0.274	0.241	1.253
Norway	0.032	0.132	0.162	0.129	0.152	0.607
Europe	6.975	6.700	12.114	9.074	12.203	47.067

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2017:

National markets by product category structure (%) Euros / RSP basis

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	11.9	13.6	22.8	21.8	29.9	100.0
France	19.5	12.7	30.5	14.3	23.0	100.0
United Kingdom	18.5	16.4	23.6	17.5	24.0	100.0
Italy	12.3	15.7	27.7	18.1	26.2	100.0
Spain	19.3	9.8	28.0	18.7	24.2	100.0
Netherlands	14.7	15.9	21.3	20.6	27.6	100.0
Poland	14.5	12.9	25.0	20.2	27.4	100.0
Belgium/Lux	18.8	12.2	25.3	25.1	18.7	100.0
Sweden	8.8	28.5	26.8	18.9	17.1	100.0
Greece	9.3	9.5	32.2	24.7	24.2	100.0
Austria	14.3	15.2	25.8	19.4	25.3	100.0
Portugal	17.0	7.2	28.4	17.4	30.0	100.0
Denmark	13.9	16.8	23.9	24.4	21.1	100.0
Romania	23.6	13.5	21.1	17.1	24.6	100.0
Czech Republic	12.8	15.5	23.0	23.0	25.7	100.0
Finland	3.9	17.9	23.8	34.1	20.4	100.0
Hungary	15.2	12.4	18.1	16.5	37.8	100.0
Ireland	15.9	14.6	21.0	20.7	27.8	100.0
Slovakia	15.9	14.3	22.1	18.6	29.0	100.0
Bulgaria	15.4	13.7	20.8	21.8	28.3	100.0
Lithuania	21.6	15.8	24.1	17.3	21.2	100.0
Croatia	12.7	14.9	28.7	14.2	29.5	100.0
Slovenia	11.9	12.9	31.6	18.5	25.1	100.0
Latvia	20.7	11.3	23.9	23.9	20.2	100.0
Estonia	16.3	14.2	27.2	19.4	23.0	100.0
EU (excluding Malta/Cyprus)	15.5	14.2	25.7	19.0	25.5	100.0
Switzerland	15.6	15.6	30.6	21.6	16.6	100.0
Norway	5.2	21.8	26.6	21.3	25.2	100.0
Europe	15.4	14.4	25.8	19.1	25.3	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2017:
National markets by product category structure (%) Euros / MSP basis

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	11.9	13.6	22.8	21.8	29.9	100.0
France	18.3	12.6	30.0	14.8	24.2	100.0
Italy	12.3	15.7	27.7	18.1	26.2	100.0
United Kingdom	18.5	16.4	23.6	17.5	24.0	100.0
Spain	19.4	9.9	28.0	18.5	24.2	100.0
Netherlands	13.1	14.0	21.7	23.7	27.5	100.0
Poland	12.8	12.9	25.4	20.1	28.9	100.0
Belgium/Lux	19.2	11.2	24.0	25.1	20.5	100.0
Sweden	7.8	28.2	26.1	19.6	18.4	100.0
Greece	8.3	9.4	30.7	23.6	28.0	100.0
Austria	13.5	15.6	26.1	19.4	25.4	100.0
Portugal	16.2	7.2	28.4	17.6	30.6	100.0
Denmark	13.4	16.9	23.7	24.4	21.6	100.0
Romania	22.5	14.0	21.5	16.5	25.5	100.0
Czech Republic	12.8	15.5	23.0	23.0	25.7	100.0
Finland	3.9	17.9	23.8	34.1	20.4	100.0
Hungary	14.1	11.4	20.8	15.8	38.0	100.0
Ireland	13.8	14.5	21.1	21.5	29.1	100.0
Slovakia	16.0	14.4	22.2	18.1	29.3	100.0
Bulgaria	15.0	13.7	20.6	22.3	28.4	100.0
Lithuania	19.3	14.7	22.6	19.6	23.8	100.0
Croatia	11.9	14.8	28.3	14.6	30.3	100.0
Slovenia	10.6	13.1	31.8	18.2	26.3	100.0
Latvia	19.7	11.7	24.2	24.1	20.3	100.0
Estonia	13.6	14.5	27.8	20.1	24.0	100.0
EU (excluding Malta/Cyprus)	15.0	14.0	25.7	19.2	26.1	100.0
Switzerland	13.3	18.1	27.5	21.9	19.2	100.0
Norway	5.2	21.8	26.7	21.2	25.0	100.0
Europe	14.8	14.2	25.7	19.3	25.9	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2017:
Product category structure by country (%) Euros / RSP basis

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	13.5	16.5	15.4	19.9	20.7	17.5
France	18.5	12.9	17.2	11.0	13.3	14.6
United Kingdom	17.2	16.4	13.1	13.1	13.6	14.3
Italy	10.4	14.2	13.9	12.3	13.4	13.0
Spain	11.0	6.0	9.5	8.6	8.4	8.8
Netherlands	3.3	3.8	2.8	3.7	3.8	3.4
Poland	4.5	4.3	4.6	5.0	5.2	4.8
Belgium/Lux	3.2	2.3	2.6	3.5	2.0	2.7
Sweden	1.5	5.1	2.7	2.5	1.7	2.6
Greece	0.7	0.7	1.4	1.4	1.0	1.1
Austria	1.7	1.9	1.8	1.9	1.8	1.8
Portugal	1.9	0.9	1.9	1.6	2.1	1.7
Denmark	1.1	1.4	1.1	1.6	1.0	1.2
Romania	2.5	1.5	1.4	1.5	1.6	1.7
Czech Republic	0.8	1.0	0.8	1.1	1.0	0.9
Finland	0.3	1.5	1.1	2.1	0.9	1.2
Hungary	0.9	0.8	0.7	0.8	1.4	0.9
Ireland	1.1	1.0	0.8	1.1	1.1	1.0
Slovakia	0.8	0.7	0.6	0.7	0.8	0.7
Bulgaria	0.5	0.5	0.4	0.6	0.6	0.5
Lithuania	0.4	0.3	0.3	0.3	0.3	0.3
Croatia	0.4	0.5	0.5	0.3	0.5	0.5
Slovenia	0.2	0.2	0.3	0.2	0.2	0.2
Latvia	0.3	0.2	0.2	0.3	0.2	0.2
Estonia	0.2	0.2	0.2	0.2	0.2	0.2
EU (excluding Malta/Cyprus)	96.8	94.8	95.3	95.3	96.7	95.8
Switzerland	2.7	2.8	3.1	3.0	1.7	2.6
Norway	0.5	2.4	1.6	1.7	1.6	1.6
Europe	100.0	100.0	100.0	100.0	100.0	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2017:

Product category structure by country (%) Euros / MSP basis

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	14.9	17.7	16.5	21.0	21.5	18.6
France	18.0	12.9	17.0	11.2	13.6	14.6
Italy	11.0	14.7	14.3	12.5	13.4	13.3
United Kingdom	16.4	15.1	12.0	11.9	12.2	13.1
Spain	11.9	6.3	9.9	8.7	8.5	9.1
Netherlands	2.8	3.1	2.7	3.9	3.4	3.2
Poland	4.5	4.8	5.2	5.5	5.9	5.3
Belgium/Lux	3.2	1.9	2.3	3.2	1.9	2.5
Sweden	1.3	4.7	2.4	2.4	1.7	2.4
Greece	0.8	0.9	1.6	1.7	1.5	1.4
Austria	1.7	2.1	1.9	1.9	1.8	1.9
Portugal	2.0	0.9	2.0	1.6	2.1	1.8
Denmark	0.9	1.2	1.0	1.3	0.9	1.0
Romania	2.4	1.5	1.3	1.3	1.5	1.6
Czech Republic	0.8	1.1	0.9	1.2	1.0	1.0
Finland	0.3	1.2	0.9	1.7	0.8	1.0
Hungary	0.9	0.8	0.8	0.8	1.4	0.9
Ireland	0.9	1.0	0.8	1.1	1.1	1.0
Slovakia	0.8	0.7	0.6	0.7	0.8	0.7
Bulgaria	0.5	0.5	0.4	0.6	0.6	0.5
Lithuania	0.3	0.3	0.2	0.3	0.2	0.3
Croatia	0.3	0.4	0.5	0.3	0.5	0.4
Slovenia	0.1	0.2	0.3	0.2	0.2	0.2
Latvia	0.2	0.2	0.2	0.2	0.1	0.2
Estonia	0.2	0.2	0.2	0.2	0.2	0.2
EU (excluding Malta/Cyprus)	97.2	94.6	95.8	95.6	96.8	96.0
Switzerland	2.4	3.4	2.9	3.0	2.0	2.7
Norway	0.5	2.0	1.3	1.4	1.2	1.3
Europe	100.1	100.0	100.0	100.0	100.0	100.0

Source: Cosmetics Europe

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1,611.0	1,842.0	3,093.0	2,959.0	4,058.0	13,563.0
France	2,208.2	1,440.4	3,456.2	1,626.4	2,608.3	11,339.5
United Kingdom	2,055.2	1,826.8	2,623.9	1,948.0	2,674.7	11,128.6
Italy	1,238.5	1,589.7	2,795.8	1,830.9	2,641.7	10,096.6
Spain	1,312.9	670.0	1,908.1	1,277.8	1,650.8	6,819.7
Netherlands	392.0	425.0	569.0	550.0	738.0	2,674.0
Poland	538.4	478.7	927.3	746.9	1,013.5	3,704.8
Belgium/Lux	387.5	251.8	522.8	517.8	386.6	2,066.5
Sweden	174.4	565.8	532.1	374.7	339.4	1,986.4
Greece	79.5	81.2	274.0	210.4	205.8	850.9
Austria	203.1	214.8	365.2	274.9	357.5	1,415.5
Portugal	230.4	97.6	386.0	236.4	407.5	1,357.9
Denmark	131.6	158.9	225.9	230.6	200.0	947.0
Romania	302.8	172.9	271.1	219.8	315.9	1,282.5
Czech Republic	94.1	113.9	168.7	168.9	188.4	734.0
Finland	35.2	163.5	216.6	310.5	185.5	911.3
Hungary	109.7	89.8	130.5	119.1	272.6	721.7
Ireland	126.2	116.6	167.2	164.7	221.4	796.1
Slovakia	90.1	81.1	125.1	105.3	164.4	566.0
Bulgaria	59.2	53.0	80.2	84.0	109.1	385.5
Lithuania	50.8	37.1	56.8	40.8	49.9	235.4
Croatia	44.9	52.7	101.1	50.0	103.9	352.6
Slovenia	20.1	21.9	53.6	31.4	42.6	169.6
Latvia	34.6	19.0	40.0	40.0	33.9	167.5
Estonia	23.0	20.1	38.5	27.4	32.5	141.5
EU (excluding Malta/Cyprus)	11,553.4	10,584.3	19,128.7	14,145.8	19,001.9	74,414.0
Switzerland	316.7	317.6	621.5	438.9	336.9	2,031.6
Norway	62.8	263.6	322.1	257.6	304.6	1,210.7
Europe	11,932.9	11,165.5	20,072.3	14,842.3	19,643.4	77,656.3

Source: Cosmetics Europe

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1,039.4	1,188.4	1,995.5	1,909.0	2,618.1	8,750.3
France	1,252.9	866.1	2,059.6	1,016.5	1,659.2	6,854.3
Italy	769.3	987.4	1,736.5	1,137.2	1,640.8	6,271.2
United Kingdom	1,141.8	1,014.9	1,457.7	1,082.2	1,485.9	6,182.5
Spain	826.7	422.8	1,196.7	789.8	1,033.6	4,269.6
Netherlands	197.0	209.4	325.1	354.8	412.3	1,498.6
Poland	316.9	320.6	629.2	497.9	717.2	2,481.8
Belgium/Lux	221.4	129.8	276.6	289.3	237.2	1,154.3
Sweden	87.6	318.2	294.8	221.7	208.0	1,130.3
Greece	53.0	60.1	195.7	150.3	179.0	638.1
Austria	119.5	138.1	231.0	171.8	224.3	884.7
Portugal	136.1	60.8	239.1	147.8	257.4	841.2
Denmark	66.2	83.2	117.1	120.1	106.6	493.2
Romania	165.8	103.5	158.5	122.1	188.5	738.4
Czech Republic	58.8	71.2	105.4	105.6	117.7	458.7
Finland	17.6	81.8	108.3	155.3	92.8	455.8
Hungary	62.6	50.4	92.2	70.1	168.6	443.9
Ireland	66.0	69.5	101.2	102.9	139.7	479.3
Slovakia	54.5	49.2	75.9	61.9	100.0	341.5
Bulgaria	37.7	34.3	51.7	56.0	71.3	251.0
Lithuania	23.7	18.0	27.7	24.0	29.2	122.6
Croatia	24.0	29.7	56.9	29.4	60.9	200.9
Slovenia	10.1	12.5	30.4	17.4	25.1	95.5
Latvia	17.2	10.2	21.2	21.1	17.8	87.5
Estonia	10.9	11.6	22.2	16.1	19.2	80.0
EU (excluding Malta/Cyprus)	6,776.6	6,341.7	11,606.2	8,670.4	11,810.3	45,205.2
Switzerland	166.7	226.8	345.3	274.3	240.6	1,253.7
Norway	31.7	132.5	161.9	128.8	151.5	606.4
Europe	6,975.0	6,701.0	12,113.3	9,073.5	12,202.4	47,065.3

Source: Cosmetics Europe

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	-2.3	1.8	-1.8	2.1	1.7	0.5
France	-1.0	-0.2	1.0	-3.9	0.2	-0.5
United Kingdom	-7.0	-11.0	-5.3	-6.1	-5.5	-6.8
Italy	0.1	1.9	3.4	0.9	1.2	1.7
Spain	5.4	3.2	1.2	0.8	1.4	2.2
Netherlands	0.8	-4.9	-3.9	0.2	-1.6	-1.9
Poland	6.7	10.5	17.6	6.9	15.0	12.1
Belgium/Lux	2.0	4.5	-0.0	-3.9	-2.6	-0.6
Sweden	6.0	7.2	0.3	12.0	-1.1	4.5
Greece	3.0	3.2	1.6	-2.3	-2.0	-0.0
Austria	3.2	3.1	3.0	1.0	3.7	2.8
Portugal	4.5	6.6	1.3	1.3	3.1	2.7
Denmark	-9.0	8.4	12.3	17.8	-8.8	4.4
Romania	6.5	10.1	6.3	5.0	2.7	5.7
Czech Republic	3.0	2.5	2.4	2.6	2.7	2.6
Finland	-5.9	-0.2	-0.7	20.7	0.1	5.7
Hungary	15.1	6.3	-15.9	4.5	6.0	2.2
Ireland	5.2	1.9	-0.1	3.2	2.7	2.5
Slovakia	4.8	4.1	3.6	0.6	3.5	3.2
Bulgaria	5.9	2.9	2.0	7.4	5.1	4.8
Lithuania	5.4	8.2	-5.6	3.3	2.5	1.9
Croatia	10.4	5.7	12.2	6.9	2.2	7.1
Slovenia	3.6	4.8	9.4	0.6	0.9	4.2
Latvia	3.3	5.0	5.5	5.3	4.0	4.6
Estonia	4.1	5.2	2.4	18.1	1.9	5.7
EU (excluding Malta/Cyprus)	-0.3	-0.1	0.6	0.7	0.7	0.4
Switzerland	-5.8	-2.6	-3.1	-6.2	-7.0	-4.8
Norway	-2.3	0.8	-2.3	5.2	-3.2	-0.4
Europe	-0.4	-0.1	0.5	0.5	0.5	0.3

Source: Cosmetics Europe

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	-2.3	1.8	-1.8	2.1	1.7	0.5
France	-1.0	-0.2	0.6	-4.7	0.2	-0.7
Italy	0.1	5.2	7.2	-14.5	-1.7	-0.9
United Kingdom	-7.0	-11.0	-5.3	-6.1	-5.5	-6.8
Spain	5.4	3.2	1.2	0.8	1.4	2.2
Netherlands	0.8	-4.9	-3.9	0.2	-1.6	-1.9
Poland	6.9	12.2	20.0	8.1	21.1	14.9
Belgium/Lux	2.0	4.5	-0.0	-3.9	-2.6	-0.7
Sweden	5.4	7.2	-0.7	12.2	-2.3	4.0
Greece	3.0	3.2	1.6	-2.3	-2.0	-0.1
Austria	3.2	3.1	1.8	1.2	3.7	2.5
Portugal	4.2	6.3	1.1	-0.2	3.1	2.3
Denmark	-8.8	8.5	12.4	17.7	-10.0	4.1
Romania	6.4	10.1	6.2	-1.8	2.7	4.5
Czech Republic	3.0	2.6	2.4	2.6	2.6	2.6
Finland	-5.9	-0.1	-0.6	20.8	0.2	5.8
Hungary	13.8	6.3	5.0	-0.4	6.0	5.8
Ireland	4.8	1.5	-0.2	4.2	2.6	2.5
Slovakia	4.4	3.8	3.3	-2.2	3.2	2.5
Bulgaria	5.9	2.7	1.8	9.8	5.0	5.2
Lithuania	5.3	6.5	-5.8	3.9	2.1	1.7
Croatia	8.0	3.9	8.9	5.9	0.5	5.0
Slovenia	2.0	2.5	7.8	-4.9	0.8	2.1
Latvia	3.6	4.1	3.4	5.0	2.3	3.7
Estonia	3.8	5.5	2.3	20.1	1.6	6.0
EU (excluding Malta/Cyprus)	-0.2	0.7	1.4	-1.8	0.7	0.2
Switzerland	-5.8	-2.6	-3.1	-6.3	-7.0	-4.8
Norway	-2.3	0.8	-2.3	5.2	-3.2	-0.4
Europe	-0.4	0.6	1.2	-1.9	0.5	0.1

Source: Cosmetics Europe

Country	2015	2016	2017
Sweden	200	193	197
Belgium/Lux	174	175	173
United Kingdom	199	183	169
France	171	171	169
Germany	165	164	163
Netherlands	165	161	156
Ireland	163	164	168
Italy	162	164	167
Denmark	187	159	164
Austria	157	158	161
Finland	159	157	164
Spain	139	144	147
Portugal	124	128	132
Slovakia	98	101	104
Estonia	97	118	107
Poland	81	87	96
Lithuania	68	80	83
Latvia	78	81	86
Croatia	78	79	85
Slovenia	80	79	82
Greece	74	79	79
Hungary	69	72	74
Czech Republic	67	68	69
Romania	60	61	65
Bulgaria	46	51	54
Average EU (excluding Malta/Cyprus)	122	123	125
Switzerland	275	256	230
Norway	227	233	229
Europe	132	132	132

Source: Cosmetics Europe

POPULATION 2015-2017 BY COUNTRY

In millions of inhabitants

Country	2015	2016	2017
Germany	81,198	82,176	83,172
France	66,488	66,760	67,219
United Kingdom	64,875	65,383	66,031
Italy	60,796	60,666	60,588
Spain	46,450	46,446	46,492
Poland	38,006	37,967	38,429
Romania	19,871	19,760	19,760
Netherlands	16,901	16,979	17,104
Greece	10,858	10,784	10,734
Belgium/Lux	11,821	11,887	11,957
Czech Republic	10,538	10,554	10,591
Portugal	10,375	10,341	10,283
Hungary	9,856	9,830	9,785
Sweden	9,747	9,851	10,071
Austria	8,576	8,690	8,810
Bulgaria	7,202	7,154	7,085
Denmark	5,660	5,707	5,776
Finland	5,472	5,487	5,552
Slovakia	5,421	5,426	5,434
Ireland	4,629	4,725	4,734
Croatia	4,225	4,191	4,136
Lithuania	2,921	2,889	2,825
Slovenia	2,063	2,064	2,068
Latvia	1,986	1,969	1,940
Estonia	1,315	1,132	1,320
EU - 28 (excluding Malta/Cyprus)	507,249	508,817	511,893
Switzerland	8,238	8,327	8,843
Norway	5,166	5,211	5,283
Europe	520,653	522,355	526,019

Source: European Commission - Directorate General for Economic and Financial Affairs

GROSS DOMESTIC PRODUCT 2015-2017 BY COUNTRY

Euros / Billions

Country	2015	2016	2017
	(extracted 120416)	(extracted 130417)	(extracted 130418)
Germany	3025.9	3133.7	3263.4
United Kingdom	2567.5	2366.9	2322.4
France	2183.6	2225.3	2287.6
Italy	1636.4	1672.4	1716.2
Spain	1081.2	1113.9	1163.7
Netherlands	678.6	697.2	731.3
Belgium/Lux	461.9	476.2	493.5
Sweden	444.2	462.5	480.7
Poland	427.8	424.6	464.6
Austria	337.2	349.5	369.2
Ireland	189.1	265.8	296.2
Denmark	266.0	277.2	288.0
Finland	207.2	214.1	223.8
Portugal	179.4	184.9	193.1
Czech Republic	156.2	174.4	191.2
Romania	159.8	169.1	187.8
Greece	176.0	175.9	177.7
Hungary	108.8	112.5	123.7
Slovakia	78.1	81.0	85.0
Bulgaria	44.2	47.4	50.4
Croatia (new)	43.9	45.6	48.9
Slovenia	38.5	39.8	43.3
Lithuania	37.2	38.6	41.9
Latvia	24.4	25.0	26.9
Estonia	19.5	20.9	23.0
EU - 28 (excluding Malta/Cyprus)	14,572.4	14,794.2	15,293.4
Switzerland	581.5	600.9	601.7
Norway	350.9	344.8	351.5
Europe	15,504.9	15,739.8	16,246.6

Source 2016 : UNECE - United Nations Economic Commission for Europe For France/Switzerland: European Commission forecast

Country	National currency	2015	2016	2017
		<i>for reference</i>		
Bulgaria	BGN	1.9558	1.9558	1.9558
Croatia	HRK	7.5302	7.5283	7.4573
Czech Republic	SIT	27.2790	27.0310	26.3705
Denmark	DKK	7.4590	7.4360	7.4388
Hungary	HUF	310.0000	311.2578	308.7887
Lithuania	LTL	3.4528	3.4528	3.4528
Norway	NOK	8.9500	9.0250	9.3292
Poland	PLN	4.1843	4.3630	4.2668
Romania	RON	4.4450	4.4899	4.5595
Sweden	SEK	9.3540	9.4678	9.5780
Switzerland	CHF	1.0680	1.0883	1.1105
United Kingdom	GBP	0.7260	0.8195	0.8779
Japan	YEN	1.3431	1.2243	1.2671
USA	US\$	1.1100	1.1072	1.1297

Source: European Commission - Directorate General for Economic and Financial Affairs

Cosmetics Europe's Vision and Mission

Our Vision: A flourishing cosmetics industry increasingly improving people's quality of life in Europe and beyond.

Our Mission: To shape a European operating environment conducive to long term growth and a sustainable future.

Every person deserves a sense of well-being, self-esteem and self-confidence: the significance of these needs is set to increase in our ageing, diversifying and fast-moving society. As a leading member association we will continue to support our members in meeting the growing needs and expectations of consumers and our stakeholders.

The quality, reliability and safety of our products is our number one priority: it is part of our DNA. We work diligently with our members to set the highest standards ensuring that cosmetic products are one of the safest and most researched classes of consumer products on the market today.

Creativity and exploration are in our nature: we are passionate about creating an environment in which all European cosmetics and personal care companies, whatever their size, can develop new or improve existing products. Investment in science and technology is central to innovation that adds value to people.

We personally care



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