Cosmetics Europe
the personal care association

MARKET PERFORMANCE 2019

European Cosmetic, Toiletry & Perfumery Data

We personally care

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DISCLAIMER:
- Previous year data figures have been updated with latest information available;
- The 2019 exchange rate applied is of 31st December 2019.

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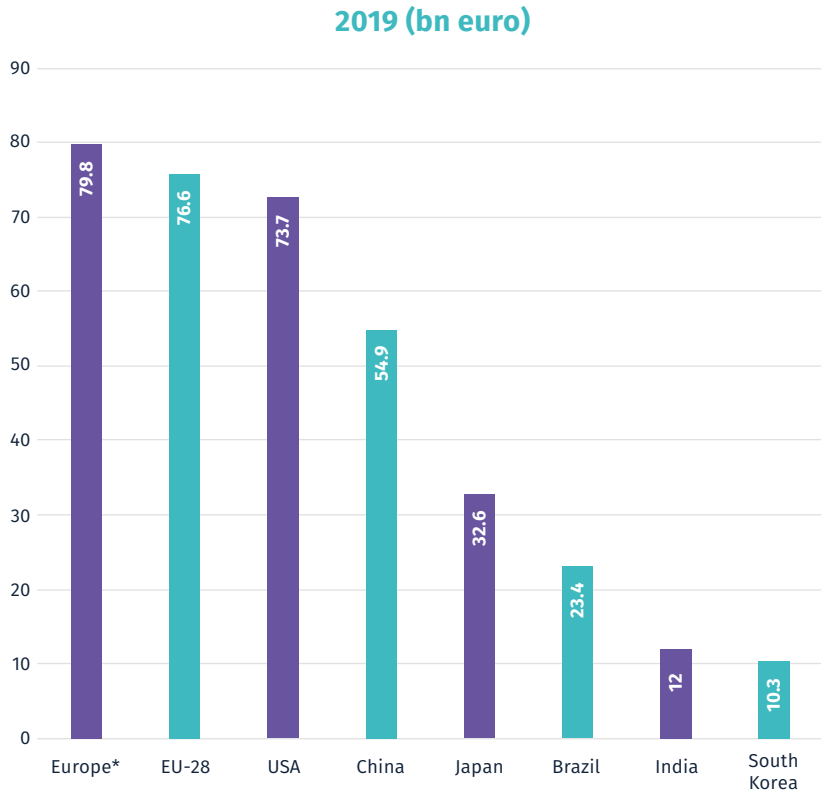
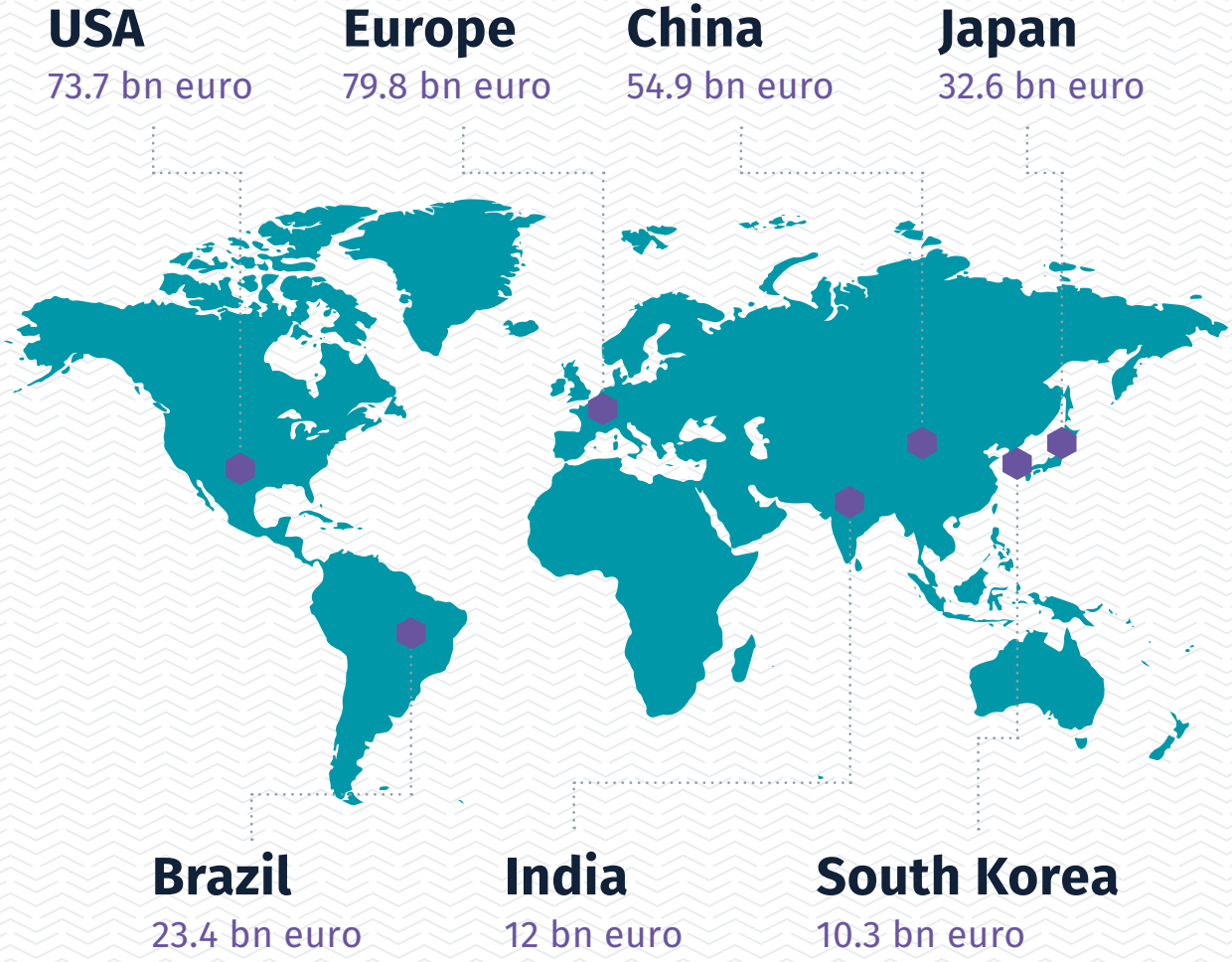
EUROPEAN INDUSTRY MARKET SHARE VS GLOBAL PERSPECTIVE

Value comparison of Europe, and other major markets - USA, Japan, China, Brazil, South Korea and India in 2019

Retail Sales Prices (RSP) in bn euro





*EU-28, Norway & Switzerland

Source: Cosmetics Europe & Euromonitor International

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EXTRA IMPORT FROM USA, CHINA, CANADA & JAPAN (2019)

EURO / RSP BASIS

		USA	China	Canada	Japan
Austria	EUR mn	8.58	2.1	0.2	0.0
Belgium	EUR mn	302.783	57.1	8.6	9.9
Bulgaria	EUR mn	0.991	2.0	0.1	0.0
Croatia	EUR mn	1.72	1.7	0.3	0.0
Cyprus	EUR mn	2.254	1.2	0.1	0.0
Czech Republic	EUR mn	32.635	6.8	11.6	2.9
Denmark	EUR mn	26.681	9.8	0.3	0.2
Estonia	EUR mn	2.967	0.9	0.0	0.4
Finland	EUR mn	10.554	2.8	0.2	0.2
France	EUR mn	415.102	89.1	38.3	67.8
Germany	EUR mn	217.207	78.7	34.7	46.1
Greece	EUR mn	4.865	8.5	0.2	0.0
Hungary	EUR mn	6.868	4.9	0.2	0.0
Ireland	EUR mn	14.537	9.0	0.3	0.0
Italy	EUR mn	38.126	24.3	2.5	1.0
Latvia	EUR mn	1.195	4.9	0.1	0.1
Lithuania	EUR mn	2.691	1.4	0.1	0.1
Luxembourg	EUR mn	0.705	0.0	0.0	0.0
Malta	EUR mn	1.135	0.5	0.0	0.0
Netherlands	EUR mn	448.093	105.8	10.3	4.0
Poland	EUR mn	30.592	48.8	3.1	1.6
Portugal	EUR mn	0.617	0.3	0.1	0.0
Romania	EUR mn	4.014	8.7	0.2	0.0
Slovakia	EUR mn	0.545	0.6	0.2	0.0
Slovenia	EUR mn	2.914	0.9	0.0	0.0
Spain	EUR mn	76.599	61.7	11.6	1.3
Sweden	EUR mn	39.25	12.9	5.6	0.5
United Kingdom	EUR mn	652.795	387.0	65.8	22.2
Switzerland	EUR mn	54.056	14.8	4.2	5.6
Norway	EUR mn	66.661	8.0	4.1	2.9
Europe	**EUR mn**	**2,467.7**	**955.2**	**202.9**	**167.0**

USA
2.47 bn euro

China
955.2 mn euro

Canada
202.9 mn euro

Japan
167 mn euro

4 key import partners: 3.79 bn euro

Total import: 6.45 bn euro

Source: Cosmetics Europe & Euromonitor International

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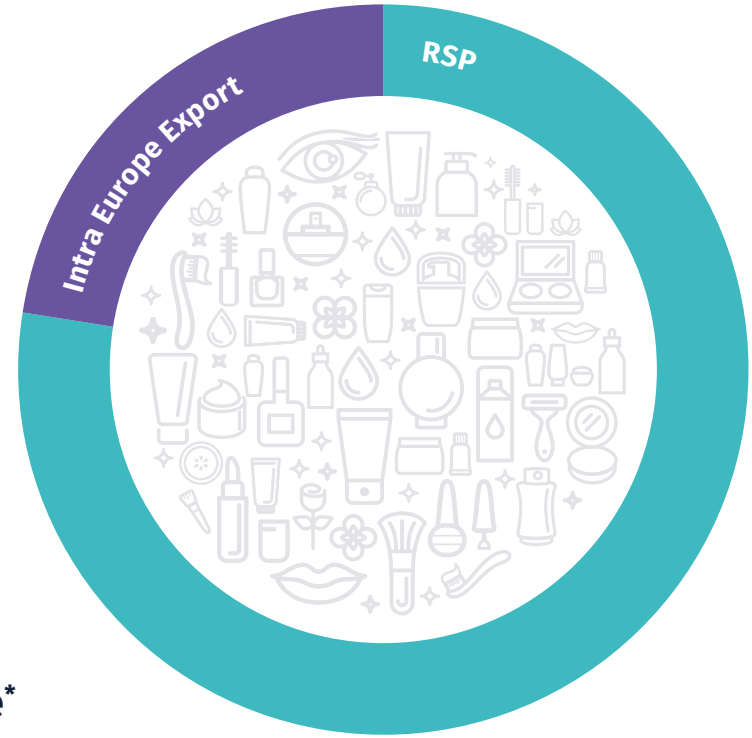
EUROPEAN C&T MARKET 2019

Total retail value of the cosmetics industry in Europe

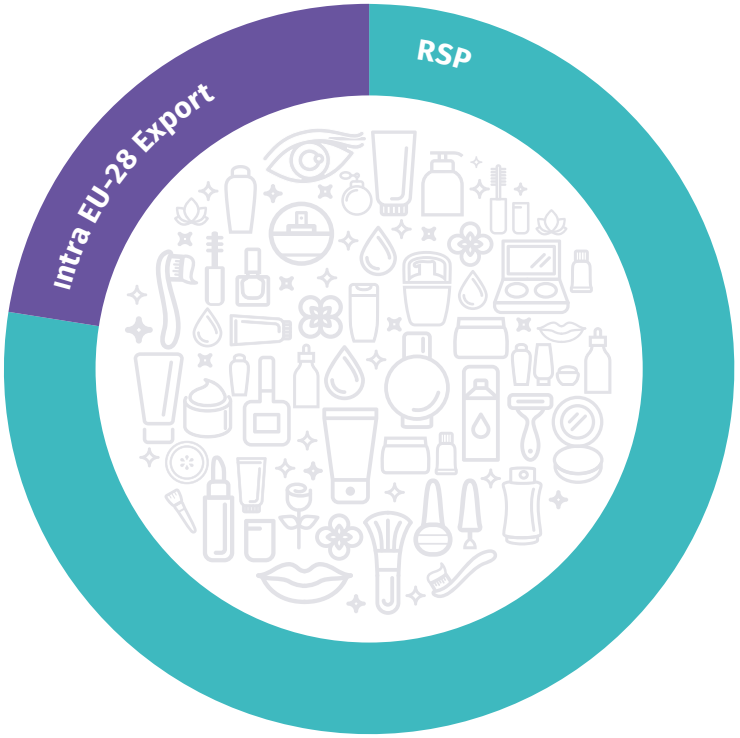


Europe*

Intra Europe Export
23.44 bn euro

RSP
(Retail Sales Price)
79.84 bn euro

Total: 103.29 bn euro



EU-28

Intra EU-28 Export
22.53 bn euro

RSP
(Retail Sales Price)
76.64 bn euro

Total: 99.16 bn euro

*EU-28, Norway & Switzerland

Source: Cosmetics Europe & Euromonitor International

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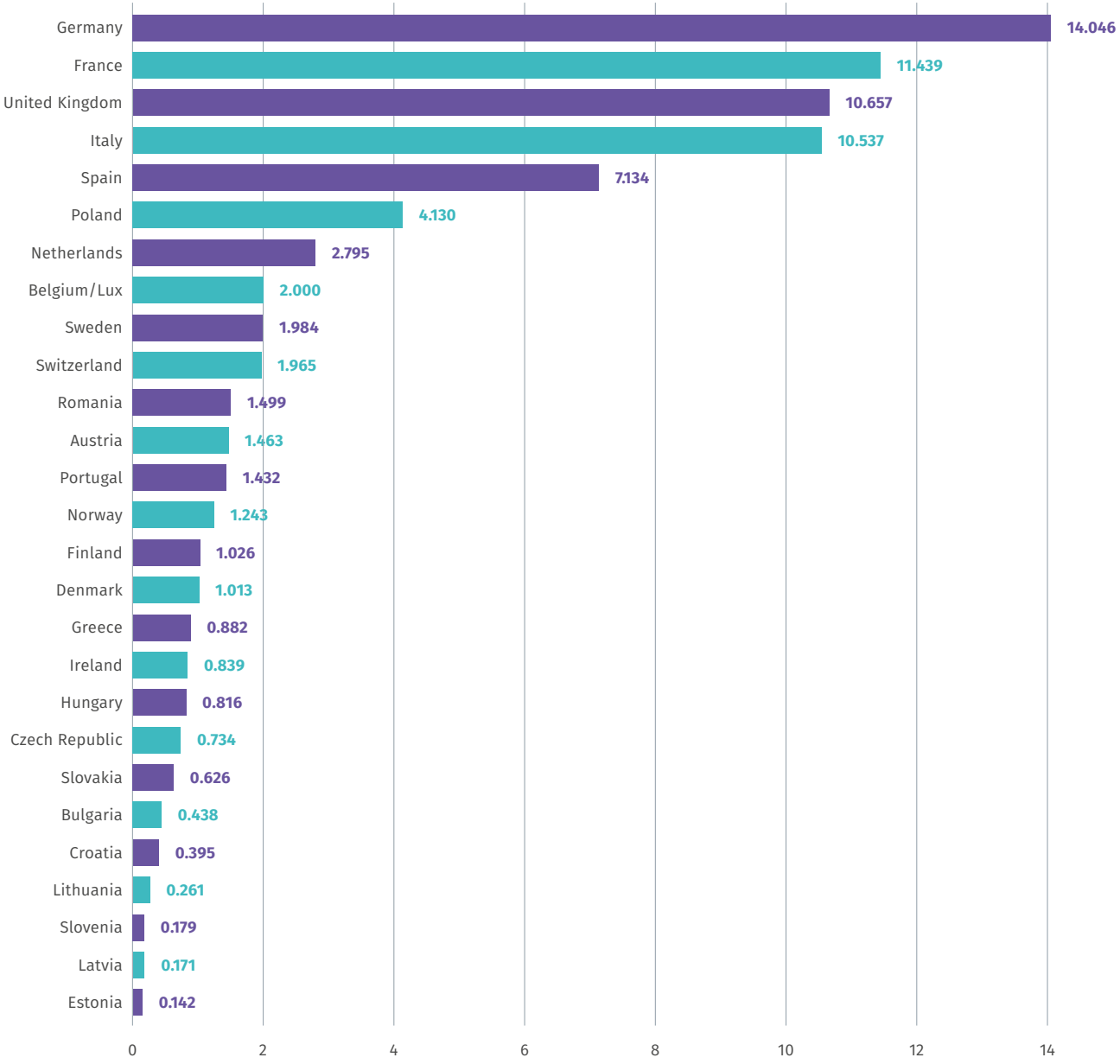
MARKET VOLUME BY COUNTRY IN 2019

Retail Sales Prices (RSP) in bn euro



Total
79.84 bn euro

Source: Cosmetics Europe & Euromonitor International

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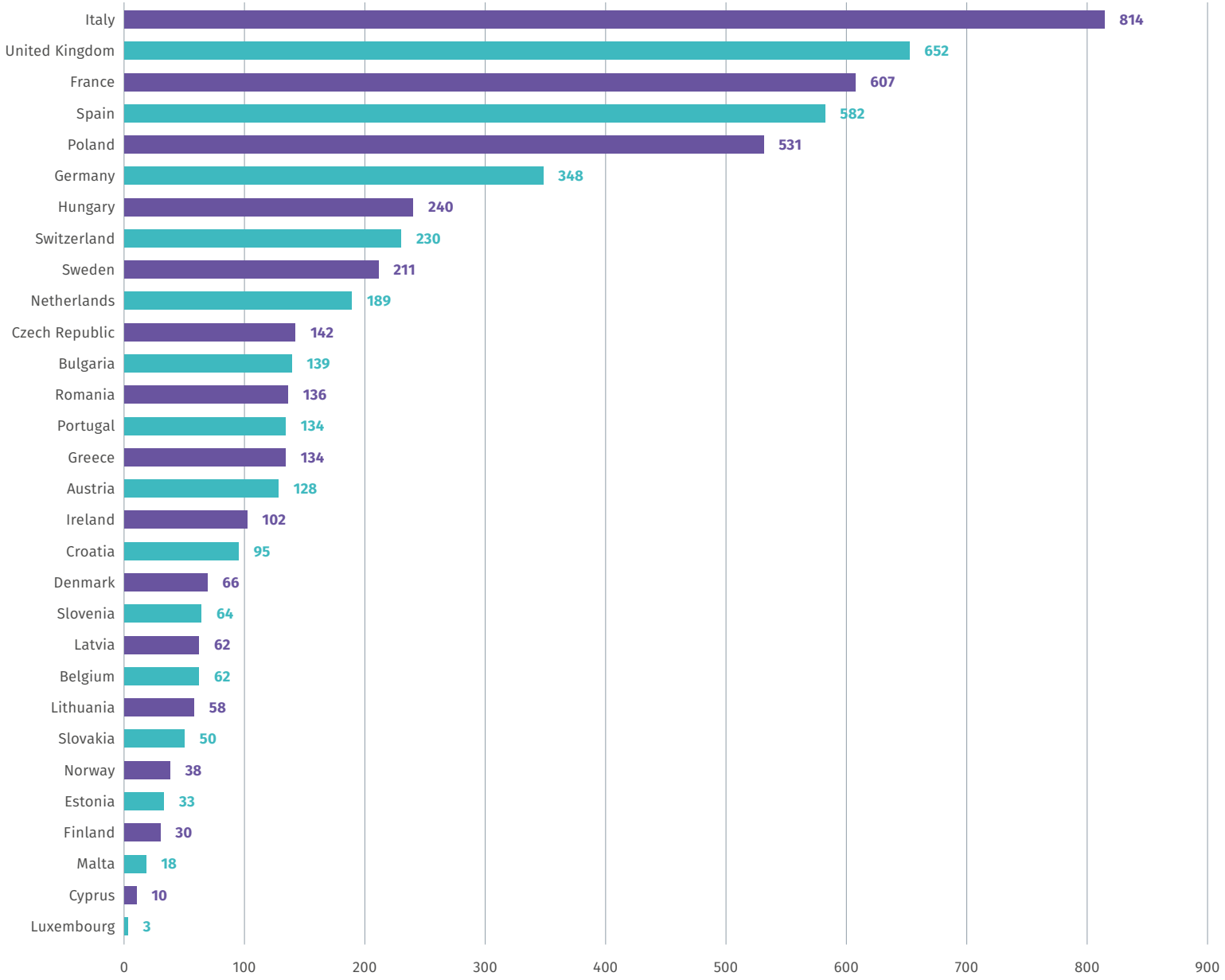
NUMBER OF SMES PER COUNTRY IN 2019



Total of
5,908
SMEs in Europe*

*EU28, Norway & Switzerland

Source: Cosmetics Europe & Euromonitor International

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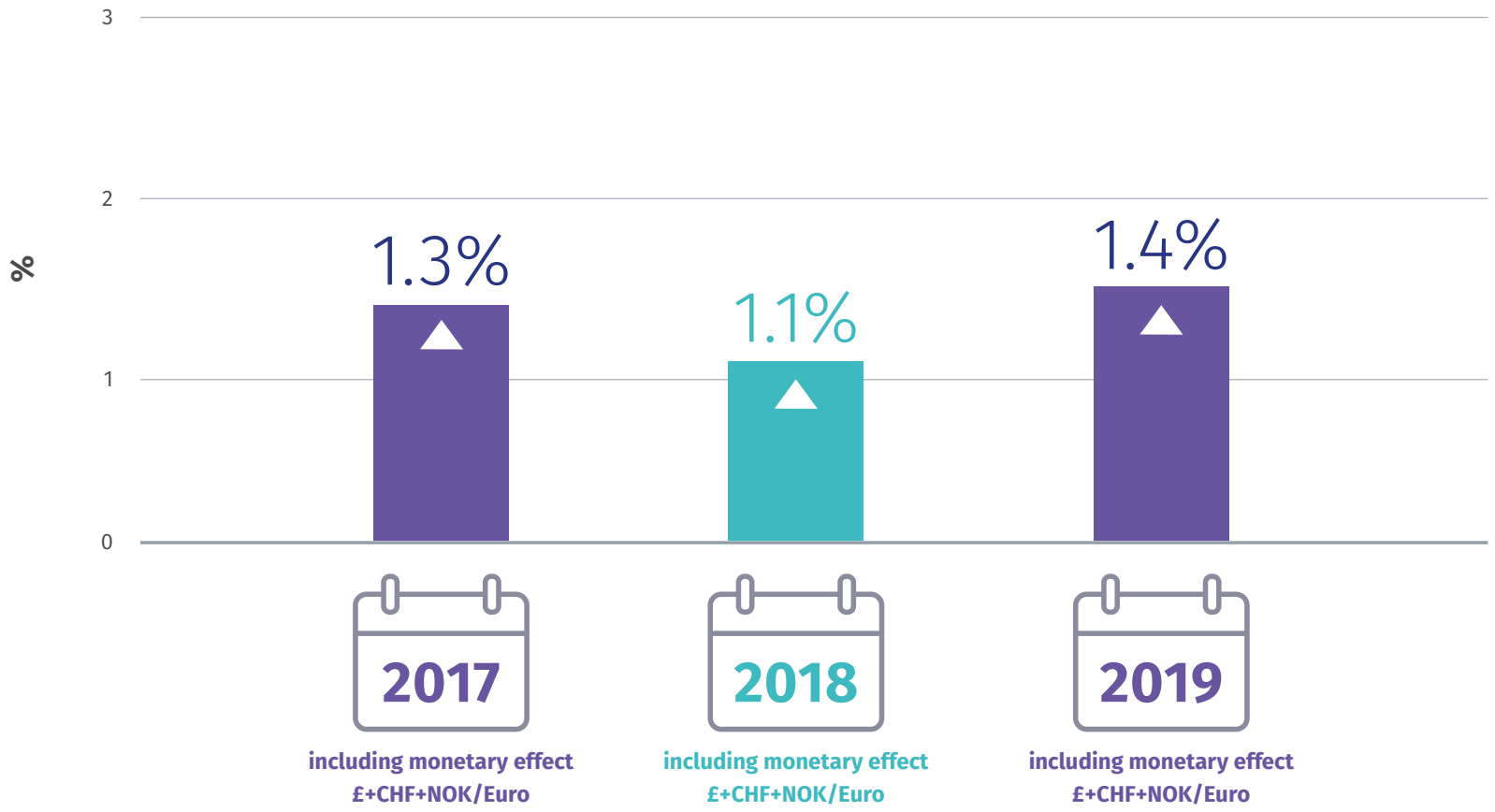
EUROPEAN C&T MARKET ANNUAL GROWTH 2017-2019

Retail Sales Prices (RSP) in bn euro and % growth



Source: Cosmetics Europe & Euromonitor International

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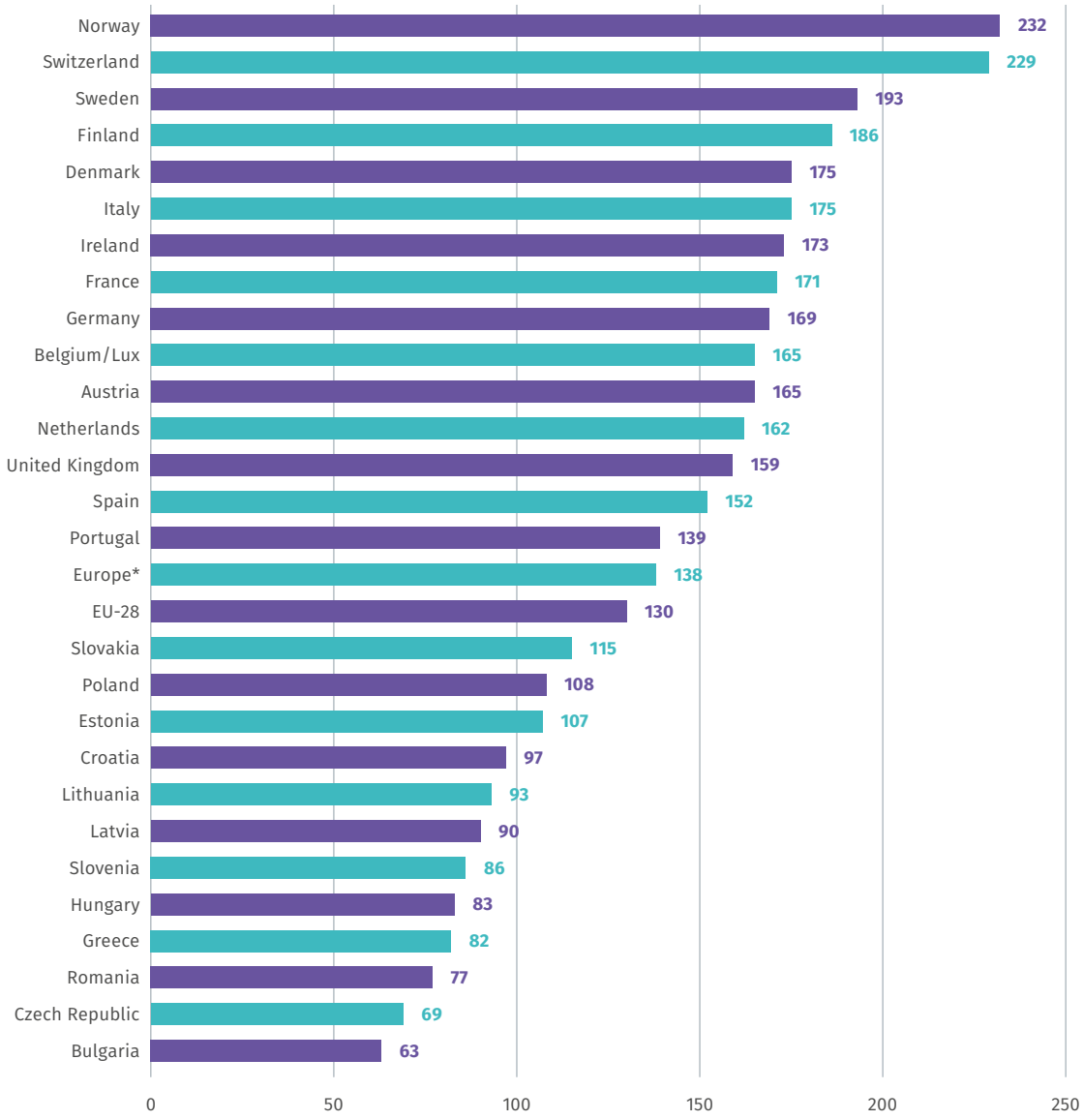
EUROPEAN C&T MARKET 2019: PER CAPITA CONSUMPTION BY COUNTRY

EURO / RSP BASIS



*EU-28, Norway & Switzerland

Source: Cosmetics Europe & Euromonitor International

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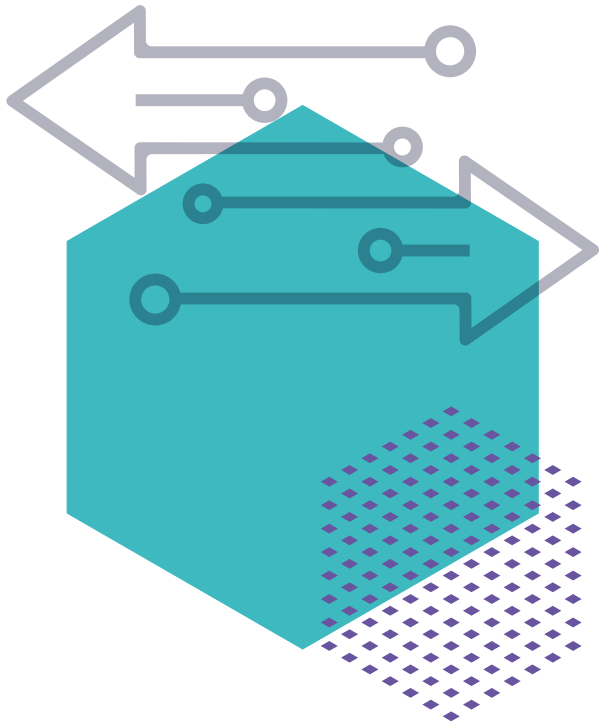
EUROPEAN C&T MARKET 2019: MARKET CHANGES 2018/2019 (%)

EURO / RSP BASIS

*EU-28, Norway & Switzerland



Source: Cosmetics Europe & Euromonitor International

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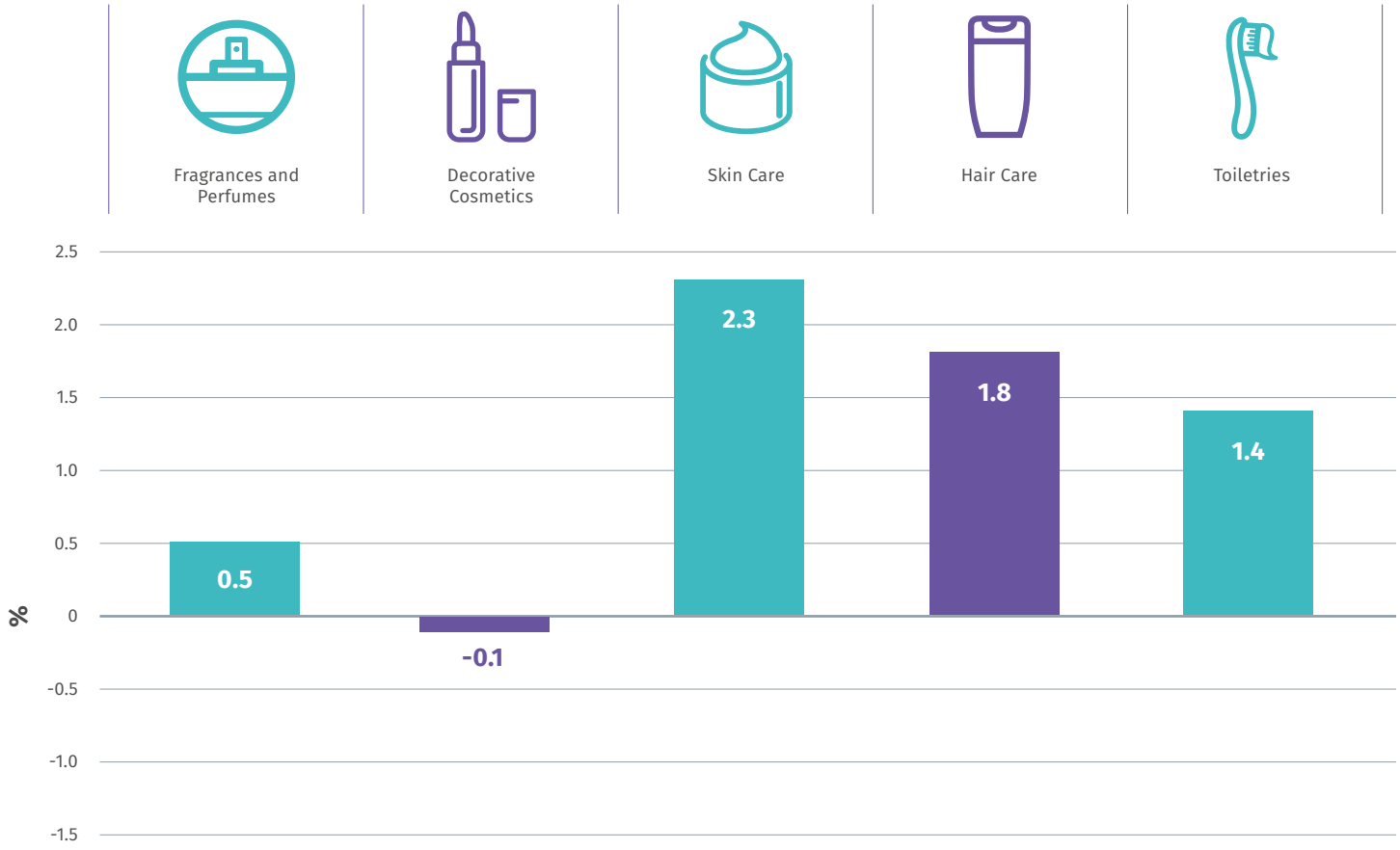
EUROPEAN C&T MARKET 2019: MARKET CHANGES BY PRODUCT CATEGORY 2018/2019 (%)

EURO / RSP BASIS



Source: Cosmetics Europe & Euromonitor International

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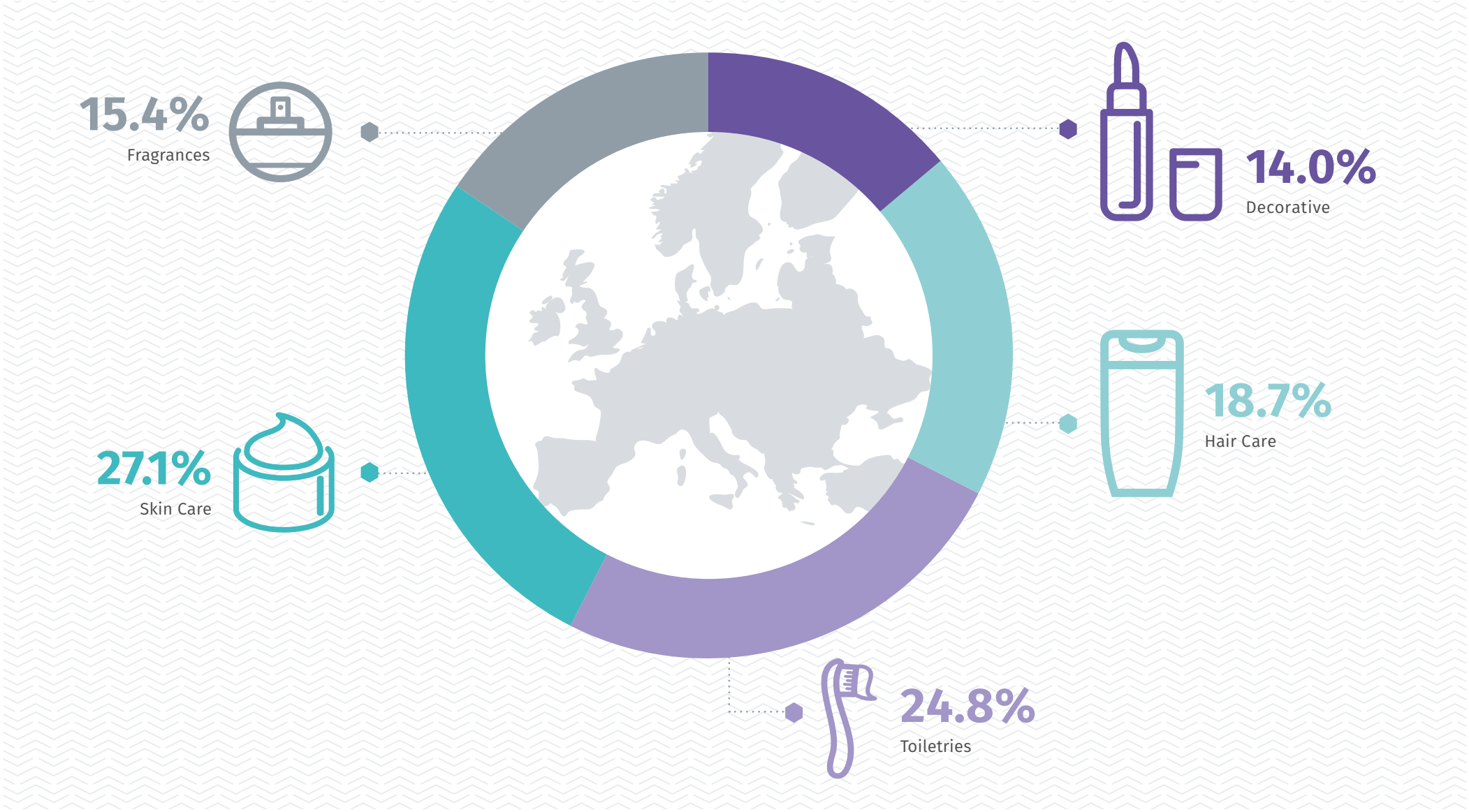
EUROPEAN C&T MARKET 2019: MARKET SHARE BY PRODUCT CATEGORY (%)

EURO / RSP BASIS



Source: Cosmetics Europe & Euromonitor International

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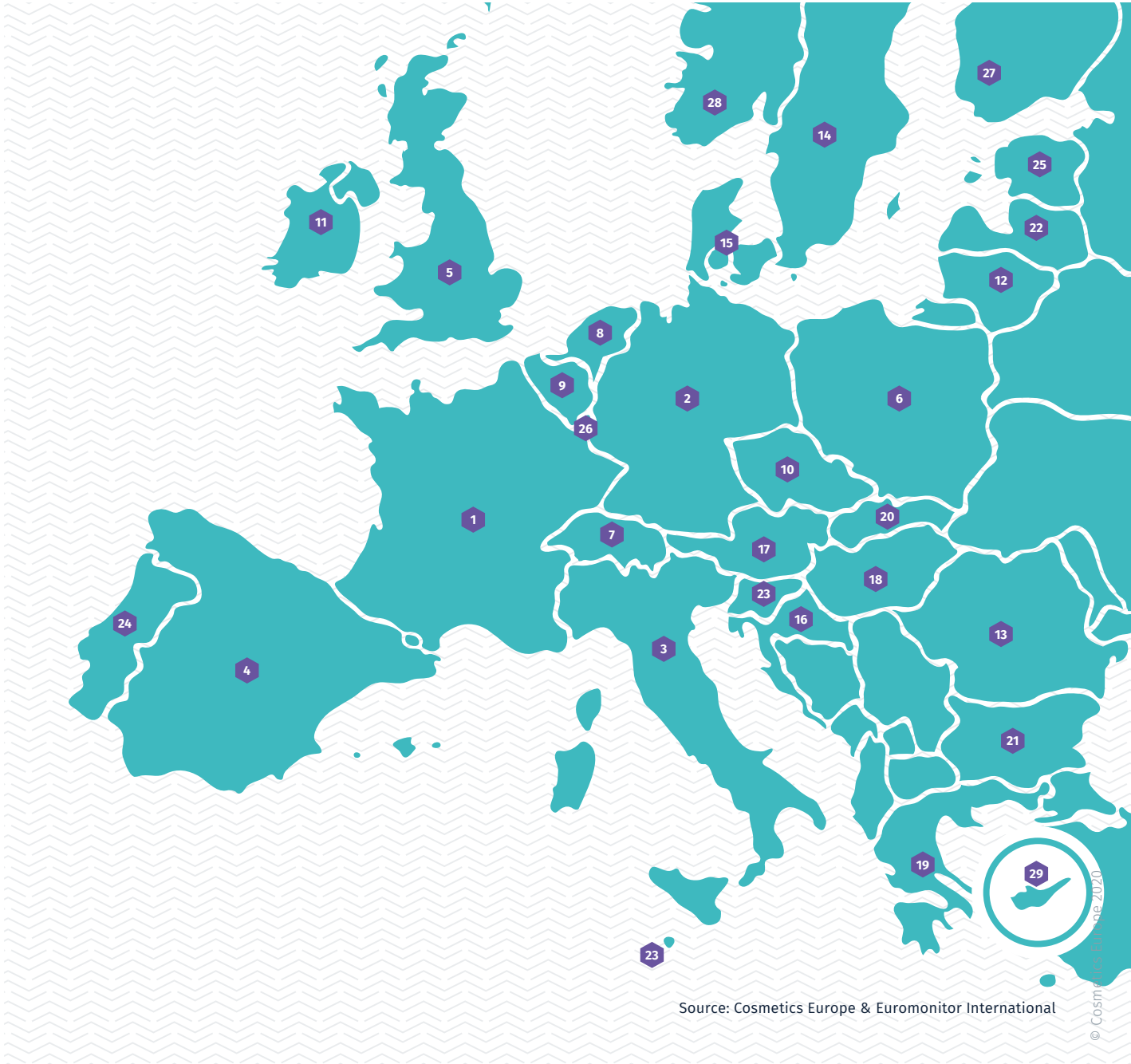
EXTRA EXPORT - EUROPE

EURO/RSP BASIS

Country	2019 TOTAL EXPORTS
France	8,601.0
Germany	3,291.3
Italy	2,065.7
Spain	2,036.1
UK	1,526.0
Poland	1,108.3
Switzerland	908.0
Netherlands	835.7
Belgium	810.1
Czech Republic	408.6
Ireland	280.0
Lithuania	246.5
Romania	231.7
Sweden	217.1
Denmark	201.3
Croatia	98.6
Austria	80.3
Hungary	76.3
Greece	71.7
Slovakia	64.2
Bulgaria	51.8
Latvia	48.3
Slovenia	45.2
Portugal	42.0
Estonia	29.6
Luxembourg	27.2
Finland	26.5
Norway	6.3
Cyprus	3.7
Malta	2.9
Europe	**23,442.1 mn euro**



Source: Cosmetics Europe & Euromonitor International

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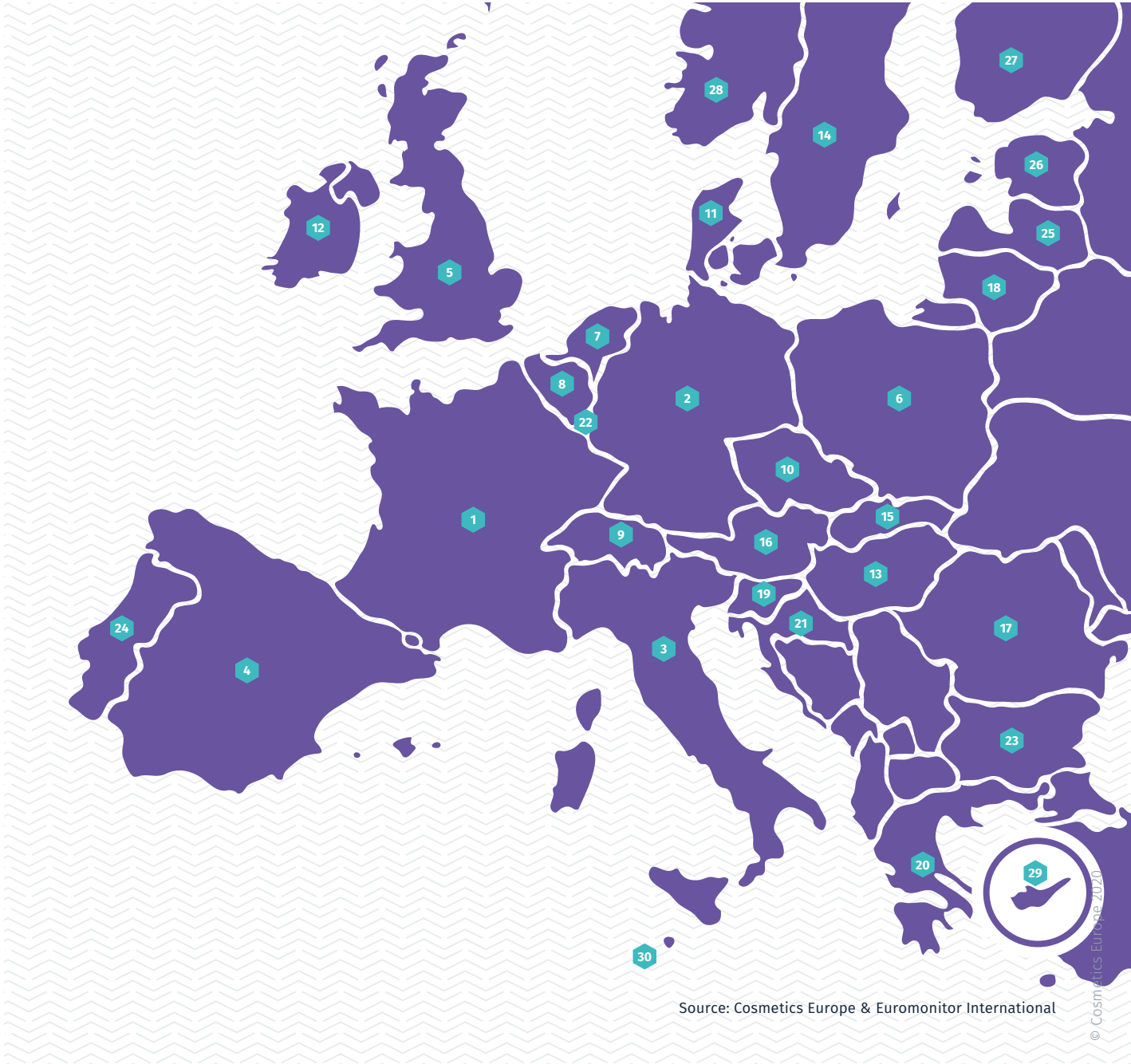
TOTAL EXPORT - EUROPE

EURO/RSP BASIS

Including intra and extra export Europe

Country	2019 TOTAL EXPORTS
France	15,425.6
Germany	8,352.0
Italy	4,886.3
Spain	4,121.3
UK	4,090.5
Poland	3,507.2
Netherlands	2,895.5
Belgium	2,570.1
Switzerland	1,657.2
Czech Republic	1,492.1
Denmark	565.6
Ireland	508.9
Hungary	454.4
Sweden	449.8
Slovakia	428.6
Austria	422.4
Romania	384.9
Lithuania	310.6
Slovenia	264.4
Greece	262.2
Croatia	223.9
Luxembourg	165.4
Bulgaria	164.2
Portugal	152.8
Latvia	116.2
Estonia	90.6
Finland	68.7
Norway	43.5
Cyprus	11.0
Malta	6.4
Europe	**54,092.2 mn euro**



Source: Cosmetics Europe & Euromonitor International

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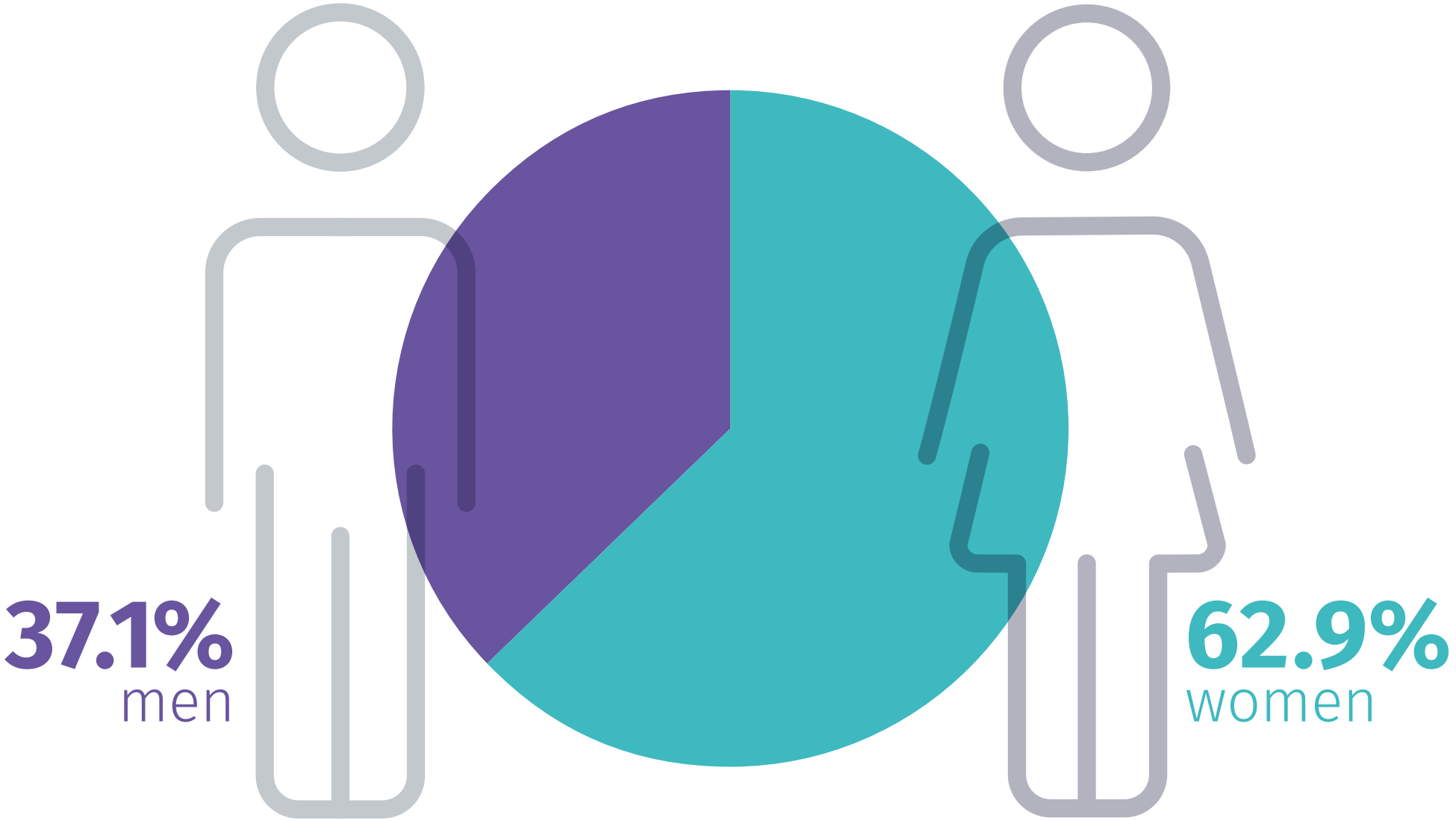
EMPLOYMENT BY GENDER 2019



Source: Cosmetics Europe & Euromonitor International

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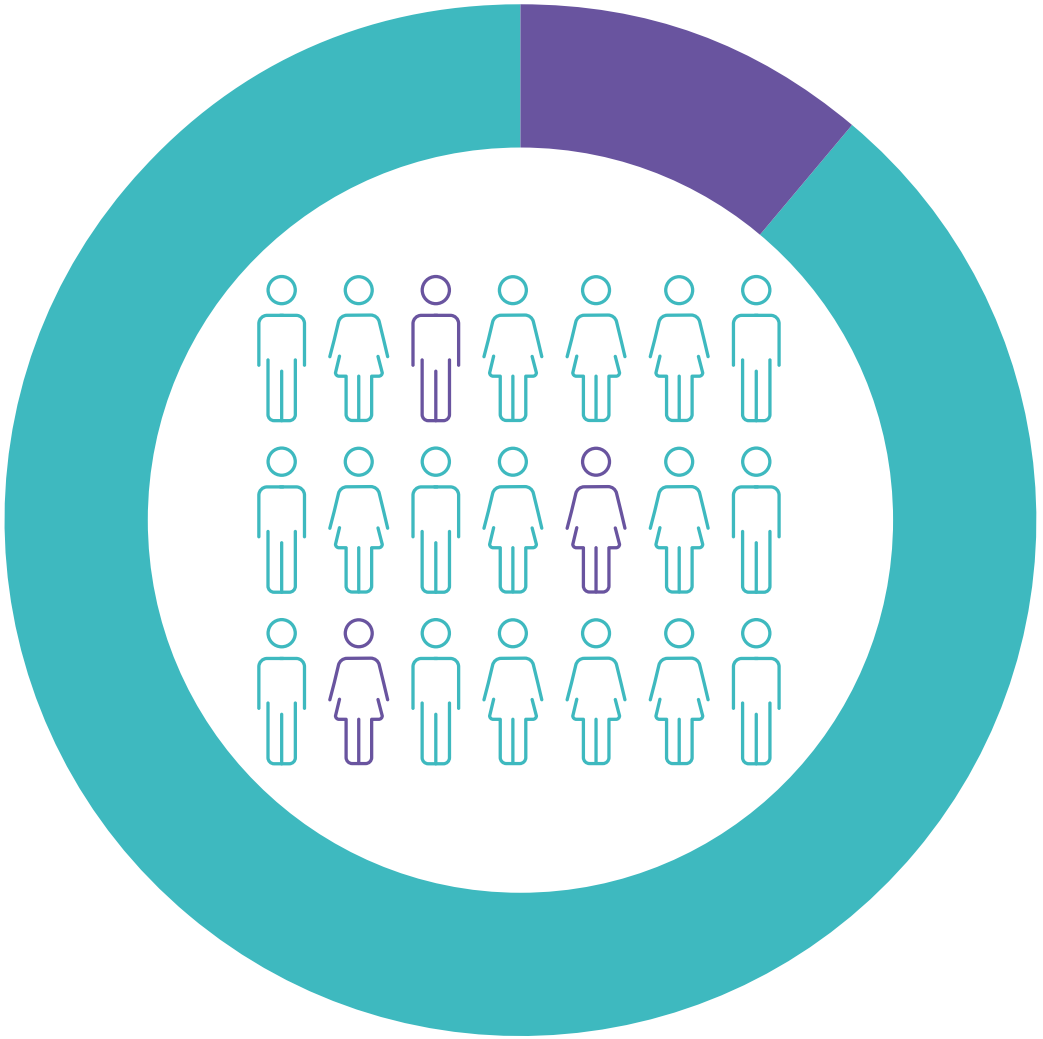
EMPLOYMENT: DIRECT AND INDIRECT EMPLOYEES 2019

206,840

Direct Employees

1,648,272

Indirect Employees



Source: Cosmetics Europe & Euromonitor International

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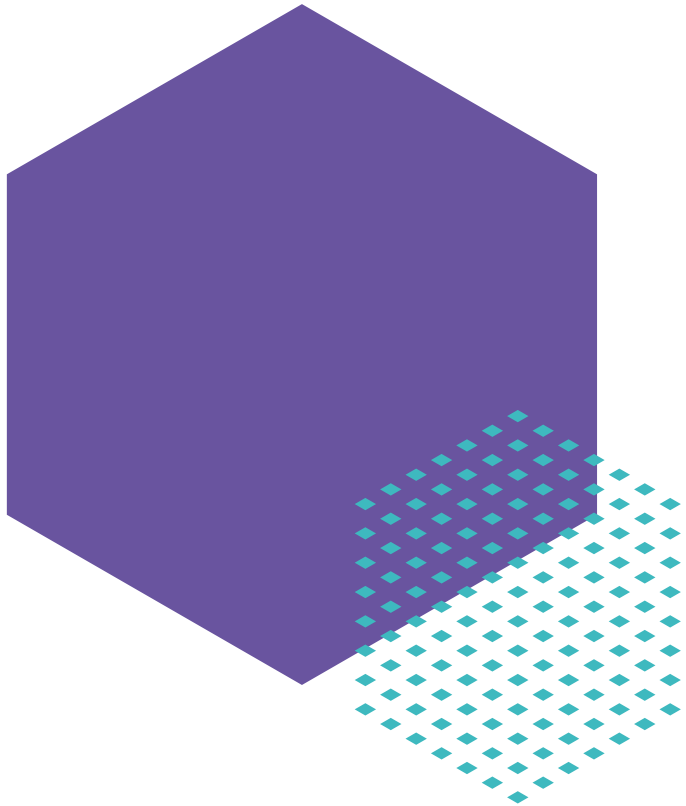
EMPLOYMENT OVERVIEW

In 2019, the European cosmetics industry employed over 1 855 000 people including 30 000 scientists. There were 654 000 life science students in Europe.



Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2017-2019

Basic data in national currency * Retail Sales Prices (RSP) and manufacturing/ex-factory sales prices (MSP)

Country	National Currencies	2017 billion		2018 billion		2019 billion		2019/18 +/- %	
		RSP	MSP	RSP	MSP	RSP	MSP	RSP	MSP
Austria	€	1.401	0.872	1.428	0.889	1.463	0.911	2.4	2.4
Belgium/Lux	€	1.959	0.995	1.987	1.008	2.000	1.024	0.7	1.6
Bulgaria	BGN	0.766	0.496	0.810	0.525	0.856	0.555	5.7	5.7
Croatia	HRK	2.740	1.549	2.773	1.568	2.930	1.656	5.7	5.6
Czech Republic	CZK	19.357	12.098	19.348	12.093	19.367	12.104	0.1	0.1
Denmark	DKK	7.045	3.668	7.281	3.802	7.564	3.945	3.9	3.8
Estonia	€	0.130	0.073	0.137	0.076	0.142	0.079	4.3	4.2
Finland	€	0.957	0.479	0.997	0.499	1.026	0.513	2.9	2.9
France	€	11.561	6.989	11.509	6.958	11.439	6.914	-0.6	-0.6
Germany	€	13.563	8.750	13.804	8.906	14.046	9.062	1.8	1.8
Greece	€	0.849	0.637	0.861	0.646	0.882	0.660	2.4	2.3
Hungary	HUF	235.607	139.475	248.863	147.250	265.361	156.970	6.6	6.6
Ireland	€	0.803	0.482	0.820	0.492	0.839	0.503	2.3	2.3
Italy	€	10.202	6.482	10.330	6.612	10.537	6.696	2.0	1.3
Latvia	€	0.155	0.081	0.163	0.085	0.171	0.089	5.2	5.1
Lithuania	€	0.239	0.124	0.250	0.129	0.261	0.134	4.5	4.3
Netherlands	€	2.730	1.524	2.754	1.539	2.795	1.563	1.5	1.5
Poland	PLN	16.051	10.554	16.838	11.068	17.751	11.662	5.4	5.4
Portugal	€	1.358	0.839	1.394	0.861	1.432	0.885	2.7	2.7
Romania	RON	6.017	3.468	6.594	3.798	7.110	4.093	7.8	7.8
Slovakia	€	0.581	0.343	0.604	0.357	0.626	0.370	3.7	3.7
Slovenia	€	0.174	0.099	0.176	0.100	0.179	0.102	1.6	1.6
Spain	€	6.820	4.270	6.958	4.358	7.134	4.471	2.5	2.6
Sweden	SEK	19.824	11.136	20.379	11.424	21.000	11.439	3.0	0.1
United Kingdom	GBP	9.805	5.447	9.564	5.313	9.348	5.193	-2.3	-2.3
Norway	NOK	11.505	5.764	11.710	5.867	12.242	7.240	4.5	23.4
Switzerland	CHF	2.231	1.476	2.204	1.493	2.181	1.478	-1.0	-1.0

* Professional hair care included

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2017-2019

Market volume by country euro / RSP basis

Country	2017 billion euro	2018 billion euro	2019 billion euro	2019/18 +/- %	2019 % share
Germany	13.563	13.804	14.046	1.75	17.6
France	11.561	11.509	11.439	-0.61	14.3
United Kingdom	11.170	10.807	10.657	-1.39	13.3
Italy	10.202	10.330	10.537	2.01	13.2
Spain	6.820	6.958	7.134	2.54	8.9
Netherlands	2.730	2.754	2.795	1.49	3.5
Poland	3.762	3.951	4.130	4.54	5.2
Belgium/Lux	1.959	1.987	2.000	0.68	2.5
Sweden	2.070	1.986	1.983	-0.15	2.5
Portugal	1.358	1.394	1.432	2.74	1.8
Austria	1.401	1.428	1.463	2.40	1.8
Denmark	0.947	0.976	1.013	3.76	1.3
Greece	0.849	0.861	0.882	2.38	1.1
Finland	0.957	0.997	1.026	2.88	1.3
Romania	1.320	1.417	1.499	5.75	1.9
Czech Republic	0.734	0.734	0.734	0.10	0.9
Hungary	0.763	0.780	0.816	4.52	1.0
Ireland	0.803	0.820	0.839	2.29	1.1
Slovakia	0.581	0.604	0.626	3.70	0.8
Croatia	0.367	0.374	0.395	5.64	0.5
Bulgaria	0.392	0.414	0.438	5.66	0.5
Lithuania	0.069	0.072	0.261	260.75	0.3
Slovenia	0.174	0.176	0.179	1.60	0.2
Latvia	0.155	0.163	0.171	5.21	0.2
Estonia	0.130	0.137	0.142	4.31	0.2
EU (excluding Malta/Cyprus)	**74.836**	**75.433**	**76.636**	**1.6**	**96.0**
Switzerland	2.009	1.914	1.964	2.65	2.4
Norway	1.233	1.220	1.243	1.88	1.6
Europe	**78.078**	**78.567**	**79.843**	**1.6**	**100.0**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2017-2019

Market volume by country euro / MSP basis

Country	2017 billion euro	2018 billion euro	2019 billion euro	2019/18 +/- %	2019 % share
Germany	8.750	8.906	9.062	1.75	18.6
France	6.989	6.958	6.914	-0.63	14.2
Italy	6.482	6.612	6.696	1.28	13.8
United Kingdom	6.205	6.004	5.920	-1.39	12.2
Spain	4.270	4.358	4.471	2.59	9.2
Poland	2.473	2.597	2.713	4.48	5.6
Netherlands	1.524	1.539	1.563	1.55	3.2
Belgium/Lux	0.995	1.008	1.024	1.61	2.1
Sweden	1.163	1.114	1.080	-2.98	2.2
Portugal	0.839	0.861	0.885	2.72	1.8
Austria	0.872	0.889	0.911	2.40	1.9
Greece	0.637	0.646	0.660	2.28	1.4
Denmark	0.493	0.510	0.528	3.64	1.1
Romania	0.761	0.816	0.863	5.68	1.8
Czech Republic	0.459	0.459	0.459	0.10	0.9
Finland	0.479	0.499	0.513	2.87	1.1
Ireland	0.482	0.492	0.503	2.26	1.0
Hungary	0.452	0.462	0.482	4.49	1.0
Slovakia	0.343	0.357	0.370	3.67	0.8
Croatia	0.208	0.212	0.223	5.61	0.5
Bulgaria	0.254	0.268	0.284	5.65	0.6
Lithuania	0.036	0.037	0.134	260.05	0.3
Slovenia	0.099	0.100	0.102	1.60	0.2
Latvia	0.081	0.085	0.089	5.09	0.2
Estonia	0.073	0.076	0.079	4.21	0.2
EU (excluding Malta/Cyprus)	**45.416**	**45.863**	**46.529**	**1.5**	**96.0**
Switzerland	1.329	1.296	1.331	2.64	2.7
Norway	0.618	0.611	0.735	20.25	1.3
Europe	**47.363**	**47.770**	**48.594**	**1.7**	**100.0**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2019

National markets by product category (billion) euro / RSP basis

Country	Fragrances / Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	TOTAL
Germany	1.579	1.810	3.300	3.220	4.137	**14.046**
France	2.168	1.412	3.459	1.600	2.801	**11.439**
United Kingdom	1.988	1.566	2.463	1.957	2.684	**10.657**
Italy	1.361	1.745	3.518	1.747	2.166	**10.537**
Spain	1.399	0.714	2.032	1.289	1.700	**7.134**
Netherlands	0.473	0.413	0.583	0.549	0.777	**2.795**
Poland	0.587	0.529	1.081	0.822	1.112	**4.130**
Belgium/Lux	0.479	0.295	0.562	0.265	0.399	**2.000**
Sweden	0.176	0.546	0.543	0.363	0.355	**1.984**
Greece	0.081	0.083	0.294	0.219	0.206	**0.882**
Austria	0.206	0.235	0.382	0.279	0.361	**1.463**
Portugal	0.250	0.107	0.408	0.246	0.421	**1.432**
Denmark	0.129	0.144	0.315	0.245	0.180	**1.013**
Romania	0.303	0.234	0.332	0.241	0.389	**1.499**
Czech Republic	0.094	0.113	0.169	0.169	0.189	**0.734**
Finland	0.035	0.168	0.276	0.325	0.222	**1.026**
Hungary	0.116	0.099	0.176	0.128	0.297	**0.816**
Ireland	0.132	0.124	0.179	0.170	0.234	**0.839**
Slovakia	0.096	0.089	0.147	0.115	0.179	**0.626**
Bulgaria	0.064	0.065	0.095	0.092	0.122	**0.438**
Croatia	0.048	0.060	0.122	0.054	0.112	**0.395**
Lithuania	0.056	0.045	0.062	0.043	0.054	**0.261**
Slovenia	0.021	0.023	0.057	0.033	0.044	**0.179**
Latvia	0.039	0.021	0.043	0.035	0.035	**0.171**
Estonia	0.026	0.018	0.034	0.029	0.035	**0.142**
EU (excluding Malta/Cyprus)	**11.905**	**10.656**	**20.631**	**14.234**	**19.210**	**76.636**
Switzerland	0.314	0.279	0.617	0.415	0.340	**1.965**
Norway	0.076	0.248	0.384	0.262	0.273	**1.243**
Europe	**12.295**	**11.183**	**21.631**	**14.911**	**19.823**	**79.844**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2019

National markets by product category (billion) euro / MSP basis

Country	Fragrances / Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	TOTAL
Germany	1.019	1.168	2.129	2.077	2.669	**9.062**
France	1.227	0.846	2.058	1.002	1.781	**6.914**
Italy	0.830	1.097	2.185	1.231	1.354	**6.696**
United Kingdom	1.104	0.870	1.368	1.087	1.491	**5.920**
Spain	0.882	0.451	1.276	0.797	1.065	**4.471**
Netherlands	0.238	0.203	0.333	0.354	0.434	**1.563**
Poland	0.343	0.351	0.728	0.540	0.751	**2.713**
Belgium/Lux	0.218	0.149	0.285	0.144	0.229	**1.024**
Greece	0.054	0.061	0.210	0.156	0.179	**0.660**
Sweden	0.085	0.294	0.289	0.202	0.210	**1.080**
Austria	0.118	0.151	0.241	0.174	0.226	**0.911**
Portugal	0.147	0.066	0.251	0.155	0.265	**0.885**
Denmark	0.065	0.076	0.163	0.128	0.097	**0.528**
Romania	0.164	0.136	0.190	0.142	0.231	**0.863**
Czech Republic	0.059	0.071	0.106	0.106	0.118	**0.459**
Finland	0.018	0.084	0.138	0.162	0.111	**0.513**
Hungary	0.066	0.056	0.099	0.079	0.184	**0.483**
Ireland	0.068	0.073	0.109	0.105	0.148	**0.503**
Slovakia	0.055	0.053	0.087	0.068	0.107	**0.370**
Bulgaria	0.041	0.042	0.061	0.060	0.080	**0.284**
Croatia	0.026	0.034	0.068	0.031	0.065	**0.224**
Lithuania	0.026	0.022	0.030	0.025	0.032	**0.134**
Slovenia	0.011	0.013	0.032	0.019	0.026	**0.102**
Latvia	0.019	0.011	0.022	0.018	0.018	**0.089**
Estonia	0.012	0.010	0.019	0.017	0.021	**0.079**
EU (excluding Malta/Cyprus)	**6.893**	**6.388**	**12.476**	**8.880**	**11.892**	**46.529**
Switzerland	0.203	0.193	0.422	0.282	0.231	**1.330**
Norway	0.041	0.146	0.223	0.155	0.171	**0.735**
Europe	**7.137**	**6.726**	**13.121**	**9.317**	**12.294**	**48.594**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2019

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

Country	Fragrances / Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	TOTAL
Germany	11.2	12.9	23.5	22.9	29.5	**100.0**
France	18.9	12.3	30.2	14.0	24.5	**100.0**
United Kingdom	18.7	14.7	23.1	18.4	25.2	**100.0**
Italy	12.9	16.6	33.4	16.6	20.6	**100.0**
Spain	19.6	10.0	28.5	18.1	23.8	**100.0**
Netherlands	16.9	14.8	20.9	19.6	27.8	**100.0**
Poland	14.2	12.8	26.2	19.9	26.9	**100.0**
Belgium/Lux	24.0	14.7	28.1	13.3	20.0	**100.0**
Sweden	8.9	27.5	27.4	18.3	17.9	**100.0**
Greece	9.2	9.4	33.3	24.8	23.3	**100.0**
Austria	14.1	16.1	26.1	19.1	24.7	**100.0**
Portugal	17.5	7.4	28.5	17.1	29.4	**100.0**
Denmark	12.7	14.3	31.1	24.2	17.7	**100.0**
Romania	20.2	15.6	22.2	16.1	25.9	**100.0**
Czech Republic	12.8	15.4	23.0	23.0	25.7	**100.0**
Finland	3.4	16.4	26.9	31.6	21.6	**100.0**
Hungary	14.2	12.2	21.5	15.7	36.4	**100.0**
Ireland	15.7	14.8	21.3	20.3	27.9	**100.0**
Slovakia	15.3	14.3	23.5	18.3	28.6	**100.0**
Bulgaria	14.7	14.8	21.6	20.9	28.0	**100.0**
Lithuania	21.4	17.3	23.9	16.6	20.8	**100.0**
Croatia	12.2	15.2	30.7	13.7	28.2	**100.0**
Slovenia	12.0	13.0	32.1	18.3	24.6	**100.0**
Latvia	22.5	12.0	24.9	20.3	20.2	**100.0**
Estonia	18.3	12.7	23.7	20.5	24.8	**100.0**
EU (excluding Malta/Cyprus)	**15.5**	**13.9**	**26.9**	**18.6**	**25.1**	**100.0**
Switzerland	16.0	14.2	31.4	21.1	17.3	**100.0**
Norway	6.1	19.9	30.9	21.1	22.0	**100.0**
Europe	**15.4**	**14.0**	**27.1**	**18.7**	**24.8**	**100.0**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2019

National markets by product category structure (%) euro / MSP basis

Country	Fragrances / Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	TOTAL
Germany	11.2	12.9	23.5	22.9	29.5	**100.0**
France	17.7	12.2	29.8	14.5	25.8	**100.0**
Italy	12.4	16.4	32.6	18.4	20.2	**100.0**
United Kingdom	18.7	14.7	23.1	18.4	25.2	**100.0**
Spain	19.7	10.1	28.5	17.8	23.8	**100.0**
Netherlands	15.2	13.0	21.3	22.7	27.8	**100.0**
Poland	12.6	12.9	26.8	19.9	27.7	**100.0**
Belgium/Lux	21.3	14.5	27.8	14.1	22.3	**100.0**
Sweden	7.9	27.2	26.7	18.7	19.5	**100.0**
Greece	8.2	9.3	31.7	23.7	27.1	**100.0**
Austria	13.0	16.6	26.5	19.1	24.8	**100.0**
Portugal	16.6	7.5	28.4	17.5	30.0	**100.0**
Denmark	12.3	14.3	30.9	24.2	18.4	**100.0**
Romania	19.0	15.7	22.0	16.5	26.8	**100.0**
Czech Republic	12.8	15.4	23.0	23.0	25.7	**100.0**
Finland	3.4	16.4	26.9	31.6	21.6	**100.0**
Hungary	13.6	11.6	20.4	16.3	38.1	**100.0**
Ireland	13.6	14.6	21.6	20.9	29.3	**100.0**
Slovakia	15.0	14.3	23.5	18.3	28.9	**100.0**
Bulgaria	14.5	14.7	21.5	21.1	28.2	**100.0**
Lithuania	19.1	16.2	22.1	18.9	23.7	**100.0**
Croatia	11.7	15.1	30.2	14.0	29.0	**100.0**
Slovenia	10.7	13.0	31.9	18.9	25.5	**100.0**
Latvia	21.5	12.4	25.2	20.5	20.5	**100.0**
Estonia	15.5	12.9	23.8	21.5	26.3	**100.1**
EU (excluding Malta/Cyprus)	**14.8**	**13.7**	**26.8**	**19.1**	**25.6**	**100.0**
Switzerland	15.2	14.5	31.7	21.2	17.4	**100.0**
Norway	5.5	19.8	30.3	21.0	23.3	**100.0**
Europe	**14.7**	**13.8**	**27.0**	**19.2**	**25.3**	**100.0**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2019

Product category structure by country (%) euro / RSP basis

Country	Fragrances / Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	TOTAL
Germany	12.8	16.2	15.3	21.6	20.9	**17.6**
France	17.6	12.6	16.0	10.7	14.1	**14.3**
United Kingdom	16.2	14.0	11.4	13.1	13.5	**13.3**
Italy	11.1	15.6	16.3	11.7	10.9	**13.2**
Spain	11.4	6.4	9.4	8.6	8.6	**8.9**
Netherlands	3.8	3.7	2.7	3.7	3.9	**3.5**
Poland	4.8	4.7	5.0	5.5	5.6	**5.2**
Belgium/Lux	3.9	2.6	2.6	1.8	2.0	**2.5**
Sweden	1.4	4.9	2.5	2.4	1.8	**2.5**
Greece	0.7	0.7	1.4	1.5	1.0	**1.1**
Austria	1.7	2.1	1.8	1.9	1.8	**1.8**
Portugal	2.0	1.0	1.9	1.6	2.1	**1.8**
Denmark	1.0	1.3	1.5	1.6	0.9	**1.3**
Romania	2.5	2.1	1.5	1.6	2.0	**1.9**
Czech Republic	0.8	1.0	0.8	1.1	1.0	**0.9**
Finland	0.3	1.5	1.3	2.2	1.1	**1.3**
Hungary	0.9	0.9	0.8	0.9	1.5	**1.0**
Ireland	1.1	1.1	0.8	1.1	1.2	**1.1**
Slovakia	0.8	0.8	0.7	0.8	0.9	**0.8**
Bulgaria	0.5	0.6	0.4	0.6	0.6	**0.5**
Lithuania	0.5	0.4	0.3	0.3	0.3	**0.3**
Croatia	0.4	0.5	0.6	0.4	0.6	**0.5**
Slovenia	0.2	0.2	0.3	0.2	0.2	**0.2**
Latvia	0.3	0.2	0.2	0.2	0.2	**0.2**
Estonia	0.2	0.2	0.2	0.2	0.2	**0.2**
EU (excluding Malta/Cyprus)	**96.8**	**95.3**	**95.4**	**95.5**	**96.9**	**95.9**
Switzerland	2.6	2.5	2.9	2.8	1.7	**2.5**
Norway	0.6	2.2	1.8	1.8	1.4	**1.6**
Europe	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2019

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

Country	Fragrances / Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	TOTAL
Germany	14.3	17.4	16.2	22.3	21.7	**18.6**
France	17.2	12.6	15.7	10.8	14.5	**14.2**
Italy	11.6	16.3	16.7	13.2	11.0	**13.8**
United Kingdom	15.5	12.9	10.4	11.7	12.1	**12.2**
Spain	12.4	6.7	9.7	8.6	8.7	**9.2**
Netherlands	3.3	3.0	2.5	3.8	3.5	**3.2**
Poland	4.8	5.2	5.5	5.8	6.1	**5.6**
Belgium/Lux	3.1	2.2	2.2	1.5	1.9	**2.1**
Sweden	1.2	4.4	2.2	2.2	1.7	**2.2**
Greece	0.8	0.9	1.6	1.7	1.5	**1.4**
Austria	1.7	2.2	1.8	1.9	1.8	**1.9**
Portugal	2.1	1.0	1.9	1.7	2.2	**1.8**
Denmark	0.9	1.1	1.2	1.4	0.8	**1.1**
Romania	2.3	2.0	1.4	1.5	1.9	**1.8**
Czech Republic	0.8	1.1	0.8	1.1	1.0	**0.9**
Finland	0.2	1.2	1.1	1.7	0.9	**1.1**
Hungary	0.9	0.8	0.8	0.8	1.5	**1.0**
Ireland	1.0	1.1	0.8	1.1	1.2	**1.0**
Slovakia	0.8	0.8	0.7	0.7	0.9	**0.8**
Bulgaria	0.6	0.6	0.5	0.6	0.7	**0.6**
Lithuania	0.4	0.3	0.2	0.3	0.3	**0.3**
Croatia	0.4	0.5	0.5	0.3	0.5	**0.5**
Slovenia	0.2	0.2	0.2	0.2	0.2	**0.2**
Latvia	0.3	0.2	0.2	0.2	0.1	**0.2**
Estonia	0.2	0.2	0.1	0.2	0.2	**0.2**
EU (excluding Malta/Cyprus)	**96.6**	**95.0**	**95.1**	**95.3**	**96.7**	**95.7**
Switzerland	2.8	2.9	3.2	3.0	1.9	**2.7**
Norway	0.6	2.2	1.7	1.7	1.4	**1.5**
Europe	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2019

Changes in national markets by product category 2019/2018 (%) euro / RSP basis

Country	Fragrances / Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	TOTAL
Germany	-1.9	0.3	0.2	3.5	3.8	**1.8**
France	-0.9	-1.7	-0.3	-0.9	-0.1	**-0.6**
United Kingdom	-4.0	-8.1	1.1	0.0	-1.9	**0.0**
Italy	4.3	2.2	2.1	1.6	0.7	**2.0**
Spain	1.9	1.5	5.1	0.3	2.3	**2.5**
Netherlands	1.9	-0.5	0.2	2.6	2.5	**1.5**
Poland	5.7	5.2	6.8	4.2	5.1	**5.4**
Belgium/Lux	2.2	1.7	2.2	0.5	-3.6	**0.7**
Sweden	3.3	3.1	2.8	2.9	3.4	**3.0**
Greece	3.9	-0.5	4.7	1.5	0.6	**2.4**
Austria	1.7	3.0	2.3	2.0	2.9	**2.4**
Portugal	4.1	4.4	3.3	1.6	1.7	**2.7**
Denmark	-2.9	-3.0	27.9	-0.2	-11.4	**3.8**
Romania	6.5	9.8	8.2	6.8	8.1	**7.8**
Czech Republic	-0.3	-0.3	0.2	0.1	0.4	**0.1**
Finland	1.8	-1.8	7.4	3.1	1.2	**2.9**
Hungary	4.9	5.8	7.5	4.4	5.3	**5.6**
Ireland	1.9	2.6	2.3	1.9	2.6	**2.3**
Slovakia	2.9	4.3	4.4	3.7	3.3	**3.7**
Bulgaria	3.8	8.7	6.7	3.8	5.6	**5.7**
Lithuania	0.0	0.0	0.0	0.0	0.0	**0.0**
Croatia	3.0	8.3	8.2	3.1	4.1	**5.7**
Slovenia	0.5	1.7	2.4	1.5	1.3	**1.6**
Latvia	5.7	4.3	6.2	5.6	3.6	**5.2**
Estonia	5.6	1.9	5.5	3.8	4.0	**4.3**
EU (excluding Malta/Cyprus)	**0.4**	**-0.1**	**2.4**	**1.8**	**1.5**	**1.4**
Switzerland	0.1	-4.9	0.4	-2.5	0.5	**-1.0**
Norway	9.2	6.3	2.2	9.7	0.5	**4.5**
Europe	**0.5**	**-0.1**	**2.3**	**1.8**	**1.4**	**1.4**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2019

Changes in national markets by product category 2019/2018 (%) euro / MSP basis

Country	Fragrances / Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	TOTAL
Germany	-1.9	0.3	0.2	3.5	3.8	**1.8**
France	-0.9	-1.8	-0.3	-0.9	-0.1	**-0.6**
United Kingdom	-4.0	-8.1	1.1	0.0	-1.9	**-2.3**
Italy	3.6	2.9	1.4	0.1	-0.6	**1.3**
Spain	1.9	1.6	5.2	0.3	2.3	**2.6**
Netherlands	1.9	-0.5	0.2	2.6	2.5	**1.5**
Poland	5.3	5.1	6.7	4.2	5.1	**5.4**
Belgium/Lux	2.2	1.6	2.1	0.5	1.1	**1.6**
Sweden	3.0	3.0	2.6	2.8	3.4	**0.1**
Greece	3.9	-0.5	4.7	1.5	0.6	**2.3**
Austria	1.7	3.0	2.3	2.0	2.9	**2.4**
Portugal	4.1	4.4	3.3	1.6	1.7	**2.7**
Denmark	-2.9	-3.0	27.9	-0.2	-11.4	**3.7**
Romania	6.2	9.6	8.1	6.8	8.1	**7.8**
Czech Republic	-0.3	-0.3	0.2	0.1	0.4	**0.1**
Finland	1.8	-1.8	7.4	3.1	1.2	**2.9**
Hungary	4.9	5.8	7.4	4.4	5.3	**5.6**
Ireland	1.7	2.5	2.2	1.9	2.6	**2.3**
Slovakia	2.8	4.3	4.4	3.6	3.3	**3.7**
Bulgaria	3.9	8.7	6.7	3.8	5.6	**5.7**
Lithuania	0.0	0.0	0.0	0.0	0.0	**0.0**
Croatia	2.9	8.3	8.1	3.1	4.1	**5.6**
Slovenia	0.5	1.7	2.3	1.5	1.3	**1.6**
Latvia	5.7	4.3	6.1	5.6	3.6	**5.1**
Estonia	5.6	1.9	5.4	3.8	4.0	**4.2**
EU (excluding Malta/Cyprus)	**0.3**	**-0.2**	**2.1**	**1.5**	**1.5**	**1.2**
Switzerland	0.1	-4.9	0.4	-2.5	0.5	**-1.0**
Norway	16.1	24.4	18.1	29.3	26.6	**23.4**
Europe	**0.4**	**0.1**	**2.3**	**1.7**	**1.7**	**1.4**

Source: Cosmetics Europe & Euromonitor International

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EUROPEAN C&T MARKET 2017-2019

Per capita consumption by country euro / RSP Basis

Country	2017	2018	2019
Sweden	186	189	193
Finland	174	181	186
Denmark	166	169	175
Italy	168	171	175
Ireland	167	169	173
France	172	171	171
Germany	163	167	169
Belgium/Lux	164	166	165
Austria	159	162	165
Netherlands	160	160	162
United Kingdom	169	164	159
Spain	147	149	152
Portugal	132	136	139
Slovakia	107	111	115
Poland	97	102	108
Estonia	99	103	107
Croatia	90	91	97
Lithuania	85	89	93
Latvia	80	85	90
Slovenia	84	85	86
Hungary	74	78	83
Greece	79	80	82
Romania	65	71	77
Czech Republic	69	69	69
Bulgaria	55	59	63
Average EU (excluding Malta/Cyprus)	**124**	**127**	**130**
Norway	221	223	232
Switzerland	237	232	229
Europe	**132**	**135**	**138**

Source: Cosmetics Europe & Euromonitor International

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POPULATION 2017-2019 BY COUNTRY

in millions of inhabitants

Country	2016	2017	2018	2019
Germany	82,176	83,172	82,883	83,200
France	66,828	67,063	67,274	67,076
United Kingdom	65,383	66,031	66,454	66,833
Italy	60,666	60,588	60,484	60,360
Spain	46,446	46,492	46,733	47,007
Poland	38,427	38,422	38,413	38,390
Romania	19,706	19,592	19,472	19,414
Netherlands	16,979	17,104	17,181	17,282
Belgium/Lux	11,915	11,957	11,972	12,106
Greece	10,784	10,734	10,734	10,725
Czech Republic	10,565	10,590	10,626	10,669
Portugal	10,326	10,300	10,284	10,276
Sweden	9,923	10,058	10,175	10,279
Hungary	9,814	9,788	9,776	9,771
Austria	8,740	8,795	8,838	8,887
Bulgaria	7,128	7,076	7,025	6,991
Denmark	5,707	5,776	5,781	5,806
Finland	5,472	5,513	5,518	5,525
Slovakia	5,431	5,438	5,446	5,453
Ireland	4,749	4,802	4,861	4,927
Croatia	4,172	4,130	4,091	4,070
Lithuania	2,868	2,828	2,802	2,793
Slovenia	2,064	2,066	2,072	2,089
Latvia	1,959	1,941	1,926	1,913
Estonia	1,316	1,316	1,319	1,325
EU 28 (excluding Malta/Cyprus)	**509,543**	**511,570**	**512,140**	**513,168**
Switzerland	8,420	8,484	8,545	8,570
Norway	5,211	5,283	5,319	5,357
Europe	**523,174**	**525,337**	**526,004**	**527,095**

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

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GROSS DOMESTIC PRODUCT 2017-2019 BY COUNTRY

euro / billions

Country	2017 (extracted 13.04.18)	2018 (extracted 15.04.19)	2019 (extracted 13.05.19)
Germany	3,263.35	3,386.00	3,435.76
United Kingdom	2,322.39	2,393.08	2,523.31
France	2,287.60	2,348.99	2,419.00
Italy	1,716.24	1,753.95	1,787.66
Spain	1,163.66	1,208.25	1,245.33
Netherlands	731.30	773.37	812.05
Belgium/Lux	493.49	509.45	536.60
Poland	464.58	496.55	529.03
Sweden	480.70	466.98	474.68
Austria	369.22	386.09	398.52
Ireland	296.15	318.46	347.22
Denmark	288.02	297.36	310.94
Finland	223.77	233.56	240.08
Romania	187.82	202.13	223.34
Czech Republic	191.23	201.15	220.20
Portugal	193.12	201.61	212.30
Greece	177.74	184.71	187.46
Hungary	123.66	131.91	143.83
Slovakia	84.99	90.20	94.17
Bulgaria	50.43	55.18	60.68
Croatia	48.94	51.51	53.94
Lithuania	41.86	45.13	48.43
Slovenia	43.28	45.95	48.01
Latvia	26.85	29.52	30.48
Estonia	23.00	25.66	28.04
EU 28 (excluding Malta/Cyprus)	**15,293.39**	**15,836.75**	**16,411.04**
Switzerland	601.68	599.02	628.11
Norway	351.51	368.44	359.11
Europe	**16,246.58**	**16,804.22**	**17,398.26**

Source: Eurostat

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EXCHANGE RATES 2017-2019 BY COUNTRY

Country	National Currency	2017	2018	2019
		for reference		
Bulgaria	BGN	1.9558	1.9558	**1.9558**
Croatia	HRK	7.4573	7.4118	**7.4137**
Czech Republic	SIT	26.3705	26.3705	**26.3705**
Denmark	DKK	7.4388	7.4600	**7.4691**
Hungary	HUF	308.7887	318.9507	**325.3826**
Lithuania	LTL	3.4528	3.4528	**1.0000**
Norway	NOK	9.3292	9.6001	**9.8516**
Poland	PLN	4.2668	4.2622	**4.2983**
Romania	RON	4.5595	4.6527	**4.7442**
Sweden	SEK	9.5780	10.2590	**10.5873**
Switzerland	CHF	1.1105	1.1517	**1.1105**
United Kingdom	GBP	0.8779	0.8849	**0.8772**
Japan	YEN	1.2671	1.3319	**1.2203**
USA	US$	1.1297	1.1804	**1.1195**

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

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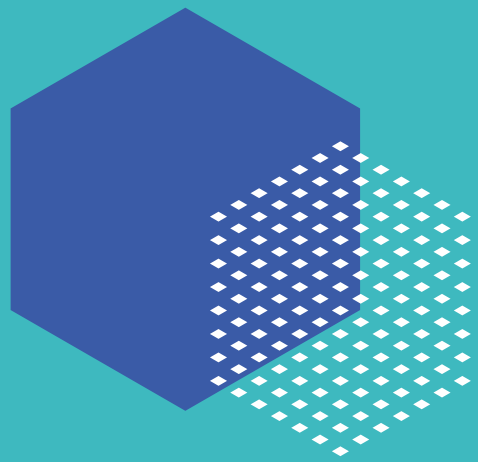
COSMETICS EUROPE'S VISION AND MISSION

For more than 50 years Cosmetics Europe has been an established European trade association for the cosmetics and personal care industry. Our members include cosmetics and personal care manufacturers as well as associations representing our industry at national level, right across Europe.

Our experts have been a trusted partner to policy makers on regulatory and scientific matters. We are committed to working collaboratively with all stakeholders to shape a successful future for our members.



Our Vision

A flourishing European cosmetics and personal care industry.

Our Mission

To shape an operating environment conducive to long term growth and a sustainable and responsible future for our industry.

We personally care

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