



Cosmetics Europe
the personal care association



**Market
Performances
2016**

European Cosmetic, Toiletry
& Perfumery Data

We personally care

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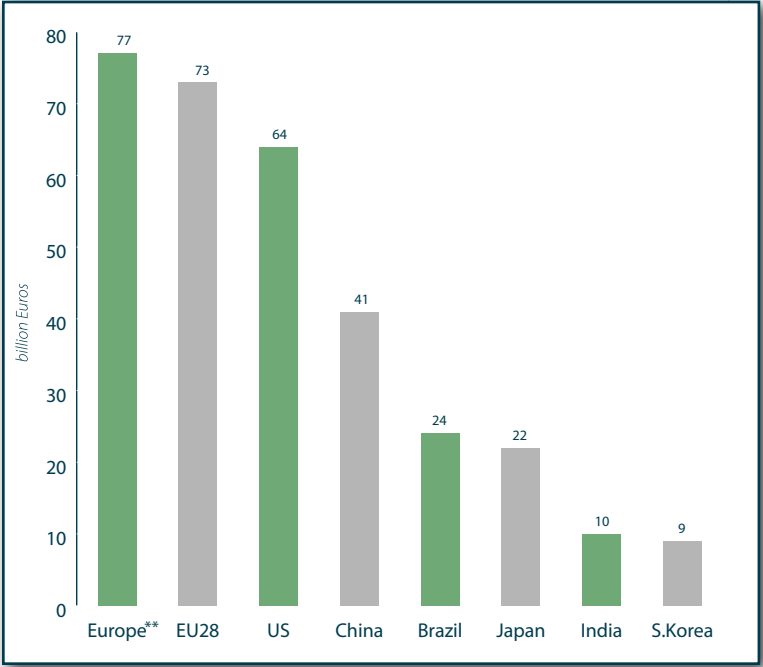
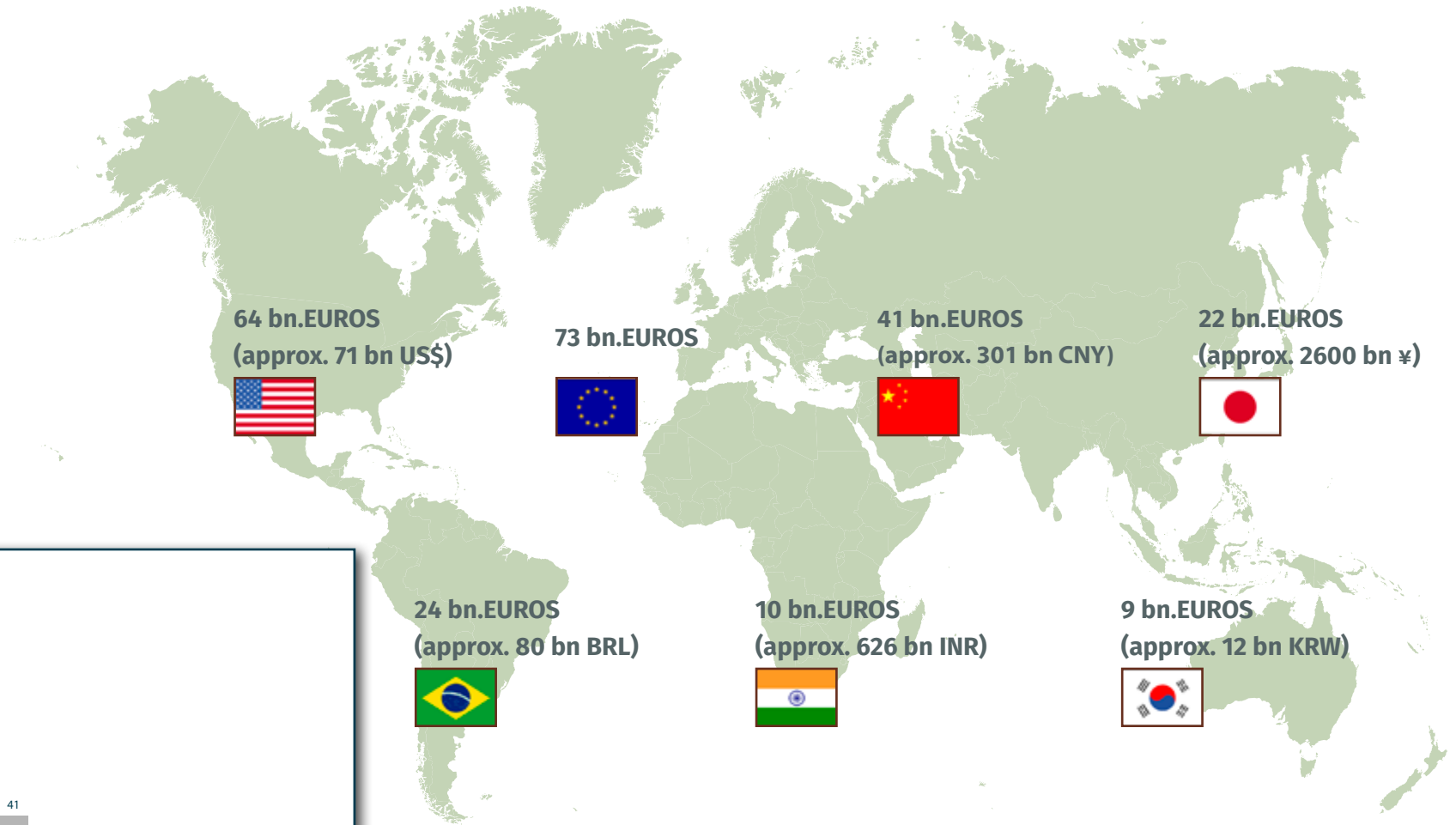
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* C&T = Cosmetics & Toiletries

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

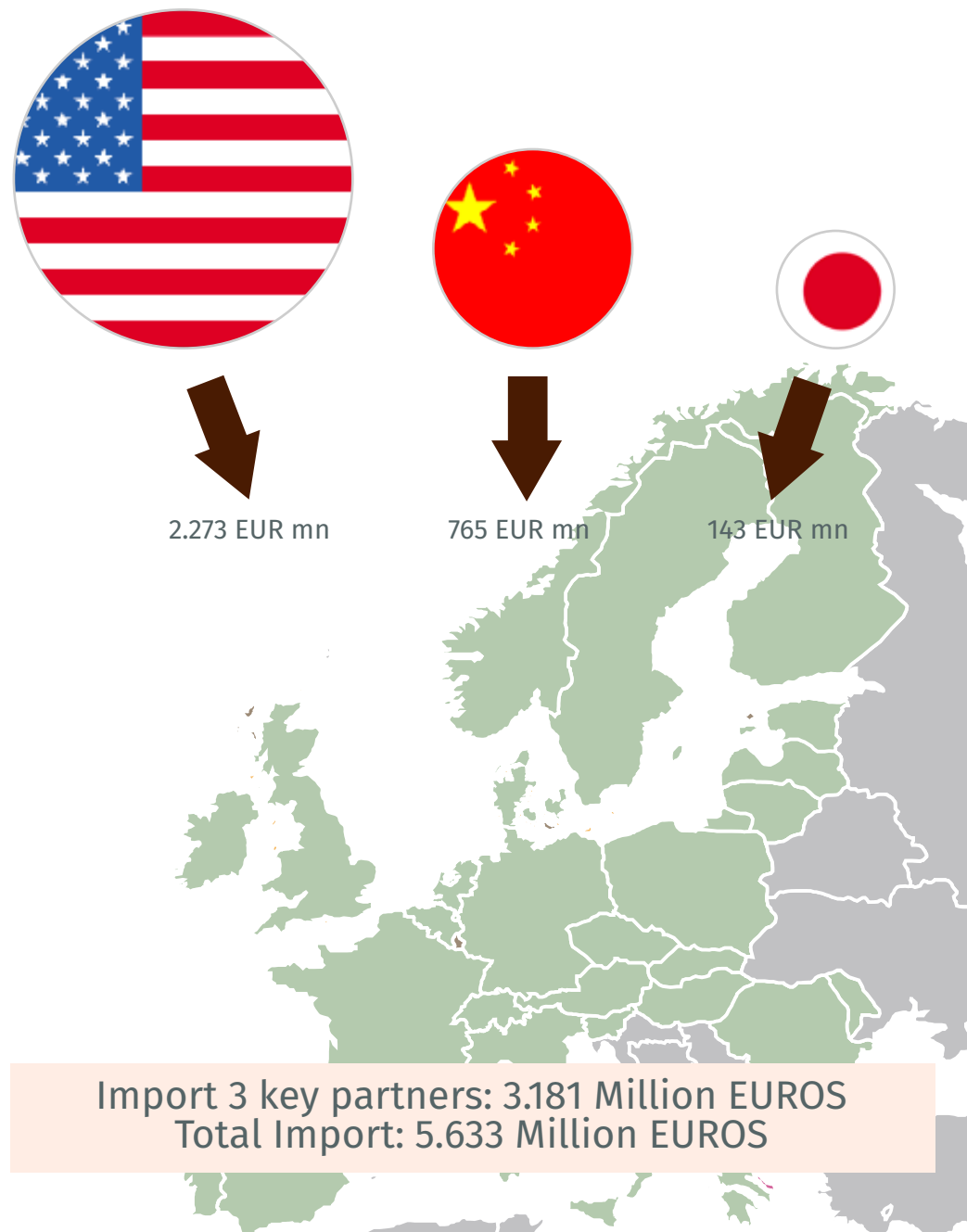
Value comparison of Europe, and other major markets - USA, Japan, China, Brazil, South Korean and India in 2016
Retail sales prices (RSP) in bn Euros*

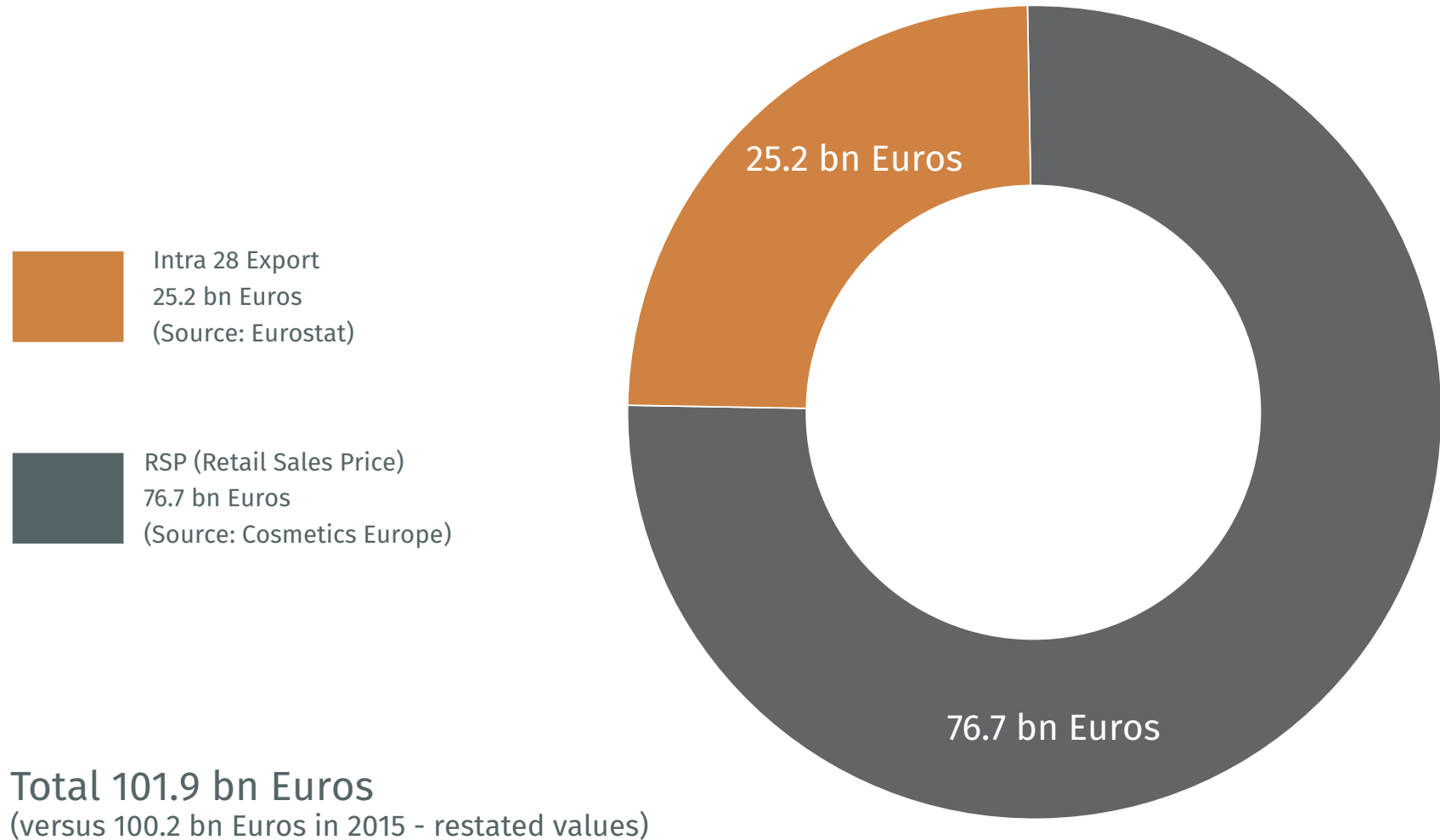


* MSP Source: Kline & Company Inc. (USA), Japan Cosmetic Industry Association (JCIA), Japan Dentifrice Manufacturers' Association (JDMA), Japan Soap and Detergent Association (JSDA), China, Brazil, India, S.Korea, (Euromonitor) according to Cosmetics Europe product nomenclature, assuming a MSP/RSP conversion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

** EU 28 + Norway and Switzerland estimated 77 bn EUR in 2016

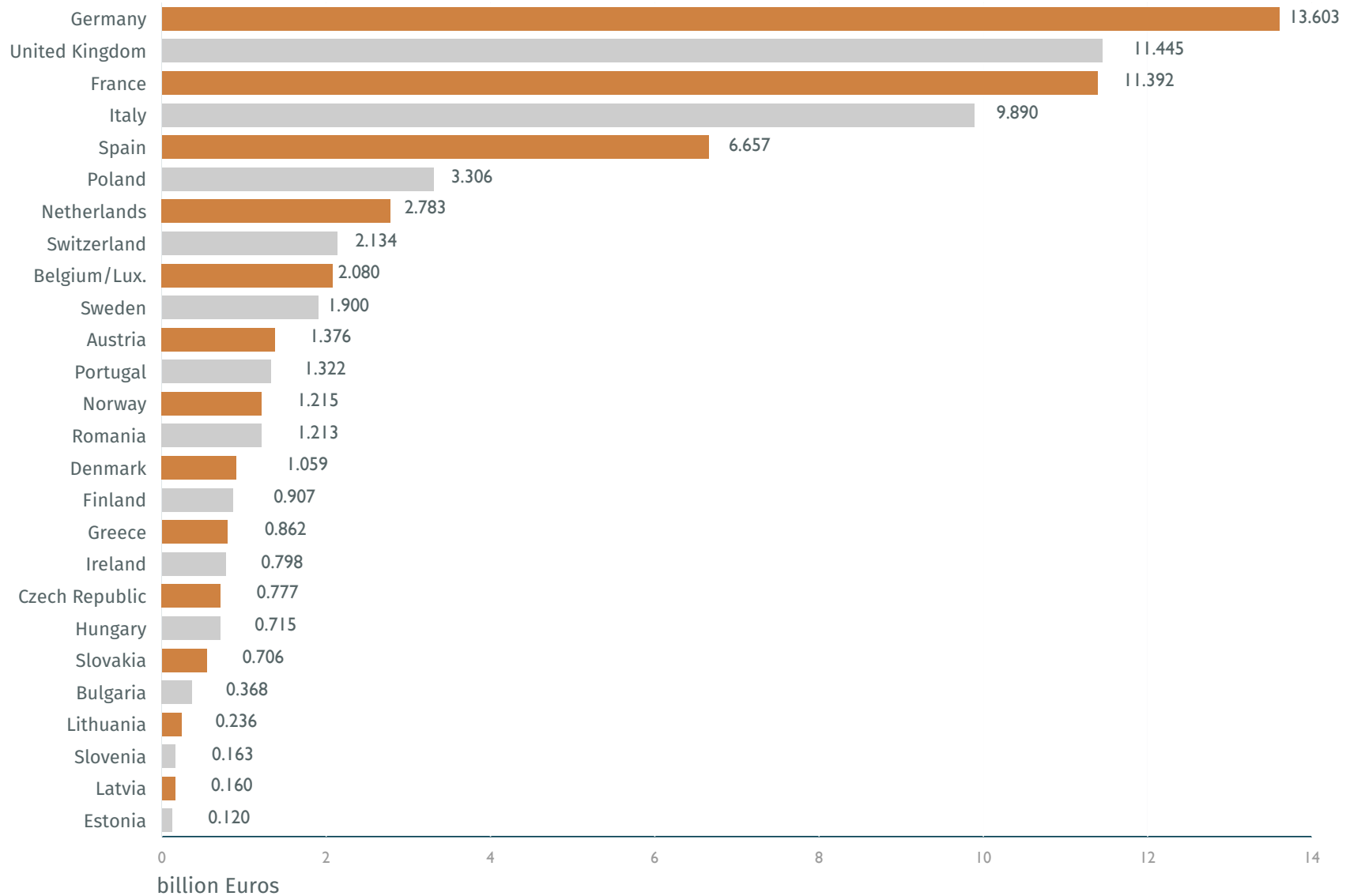
	CHINA	JAPAN	USA
Austria	1.9	0	11.2
Belgium	33.7	16.3	200.9
Bulgaria	1.1	0	1
Croatia	1	0	1.7
Cyprus	0.7	0	1.9
Czech Republic	3.6	0.3	15.5
Denmark	11.5	0.3	32.5
Estonia	0.9	0.3	2.1
Finland	1.5	0.1	8
France	65.5	30.5	277.7
Germany	80.6	59.4	276.9
Greece	9.6	0.1	8.2
Hungary	1.5	0.1	5.7
Ireland	6.1	0.1	15.5
Italy	49.5	0.8	46.7
Latvia	1.8	0	1
Lithuania	0.6	0	3.7
Luxembourg	0	0.1	0.9
Malta	0.3	0	1.2
Netherlands	61.6	3.6	419.4
Poland	46.7	1	24.5
Portugal	0.2	0	0.5
Romania	4.7	0	2.3
Slovakia	0.6	0	0.5
Slovenia	1.4	0	3.3
Spain	47	2.9	66.2
Sweden	9.7	0.5	60.1
UK	297.2	17	657.2
Switzerland	14.2	4	52.3
Norway	10.6	5.3	74.5
Europe 30	765.2	142.8	2,273.2





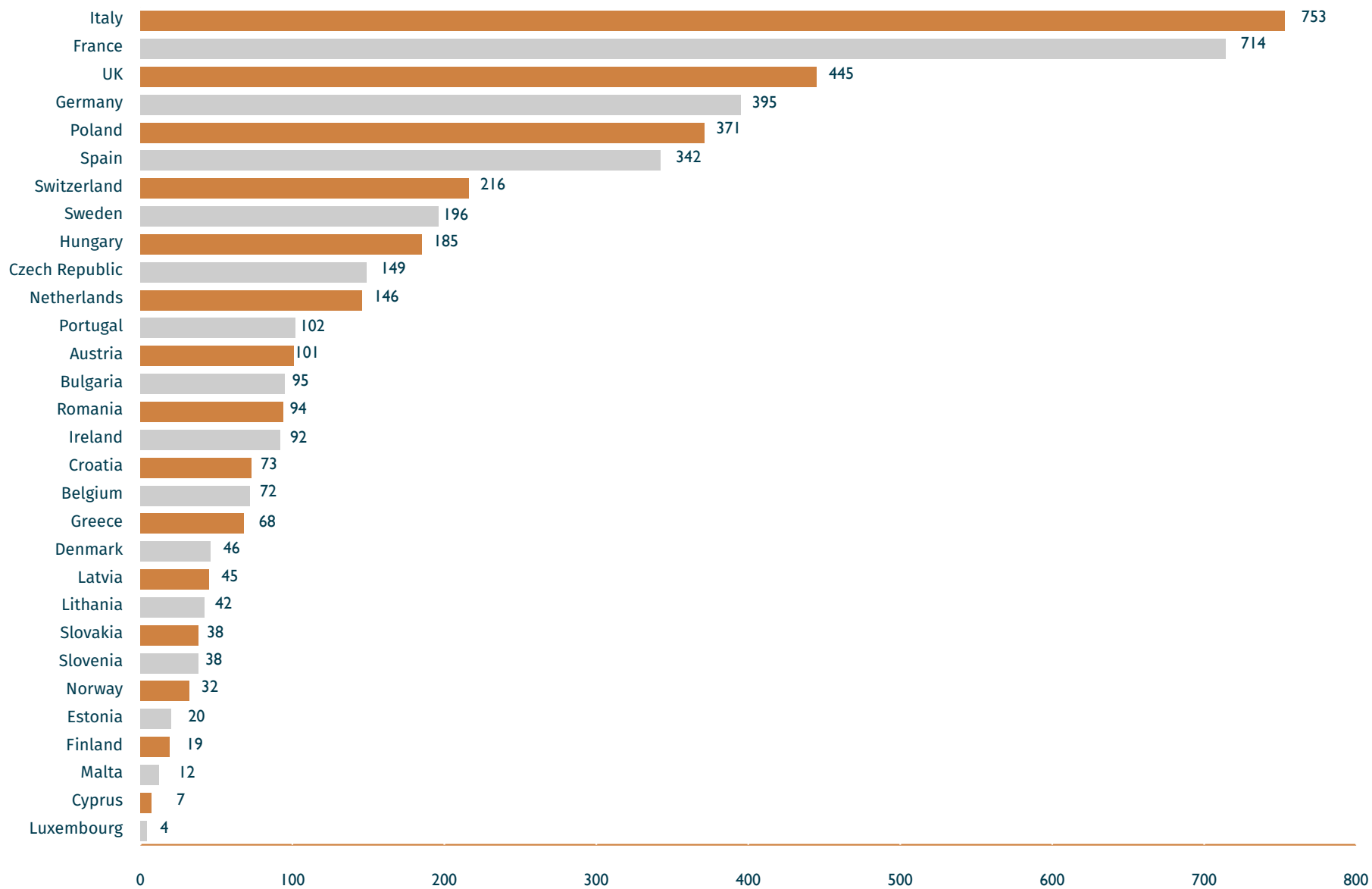
MARKET VOLUME IN EUROS BY COUNTRY 2016

Retail sales prices (RSP) in bn Euros



Total Europe*: 77.1 bn Euros
Total EU: 73.6 bn Euros

*Europe = EU28 Norway and Switzerland
Source: Cosmetics Europe

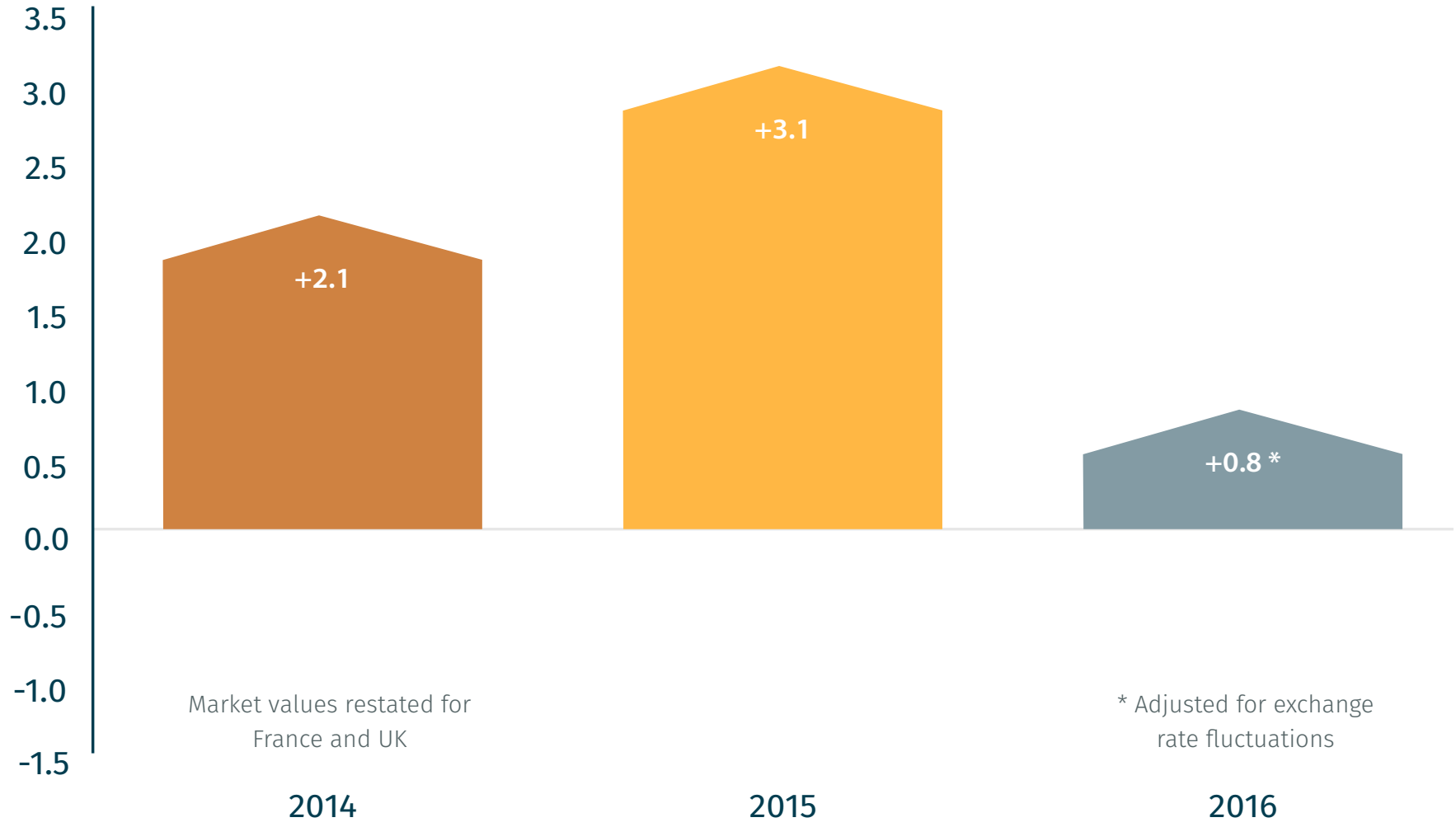


Total of 4,912 SMEs in Europe*

*Europe = EU28 Norway and Switzerland
Source: Euromonitor International

EUROPEAN C&T MARKET: ANNUAL GROWTH 2014-2016

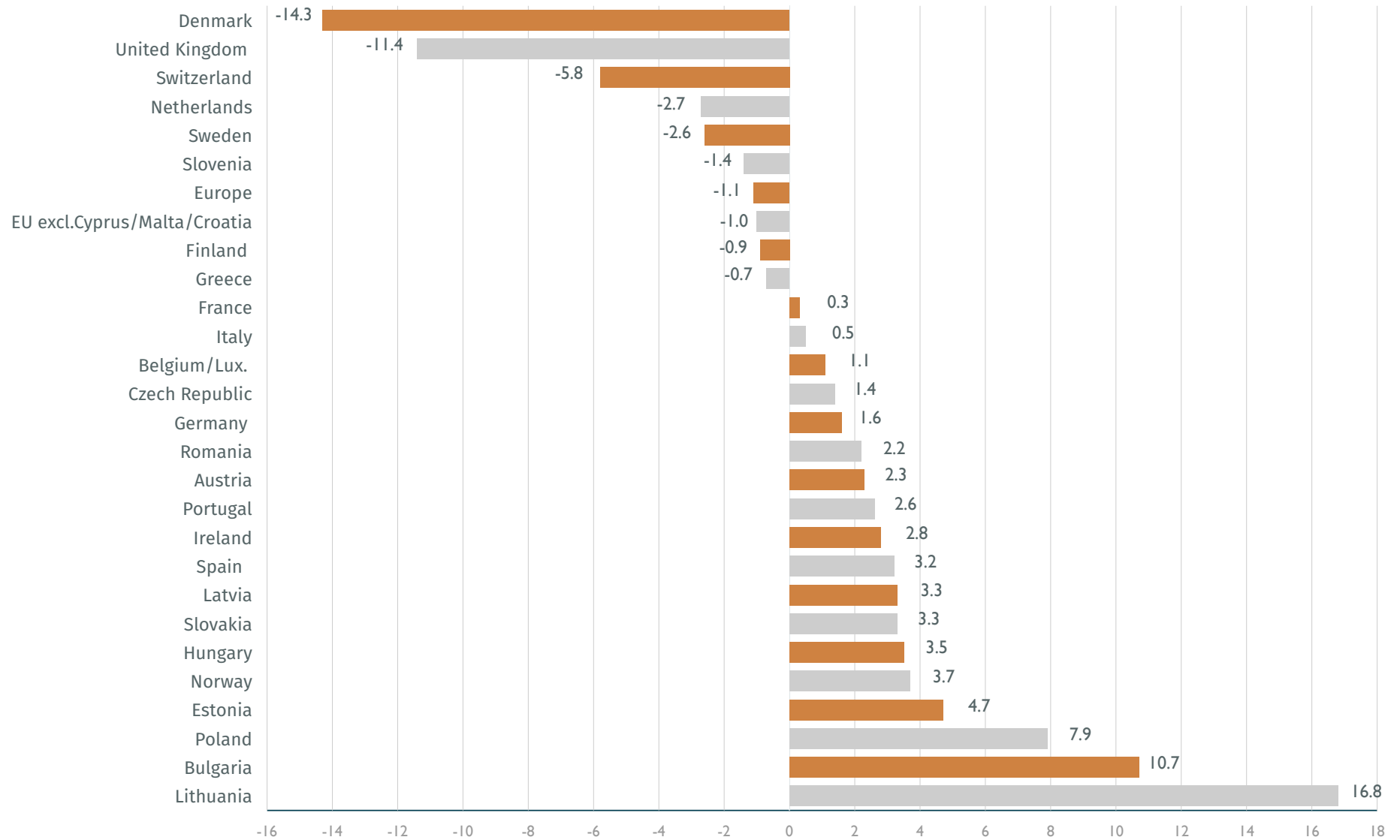
Retail Sales Price (RSP) in bn Euros and % growth



Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016: MARKET CHANGES IN EUROS 2016/2015 (%)

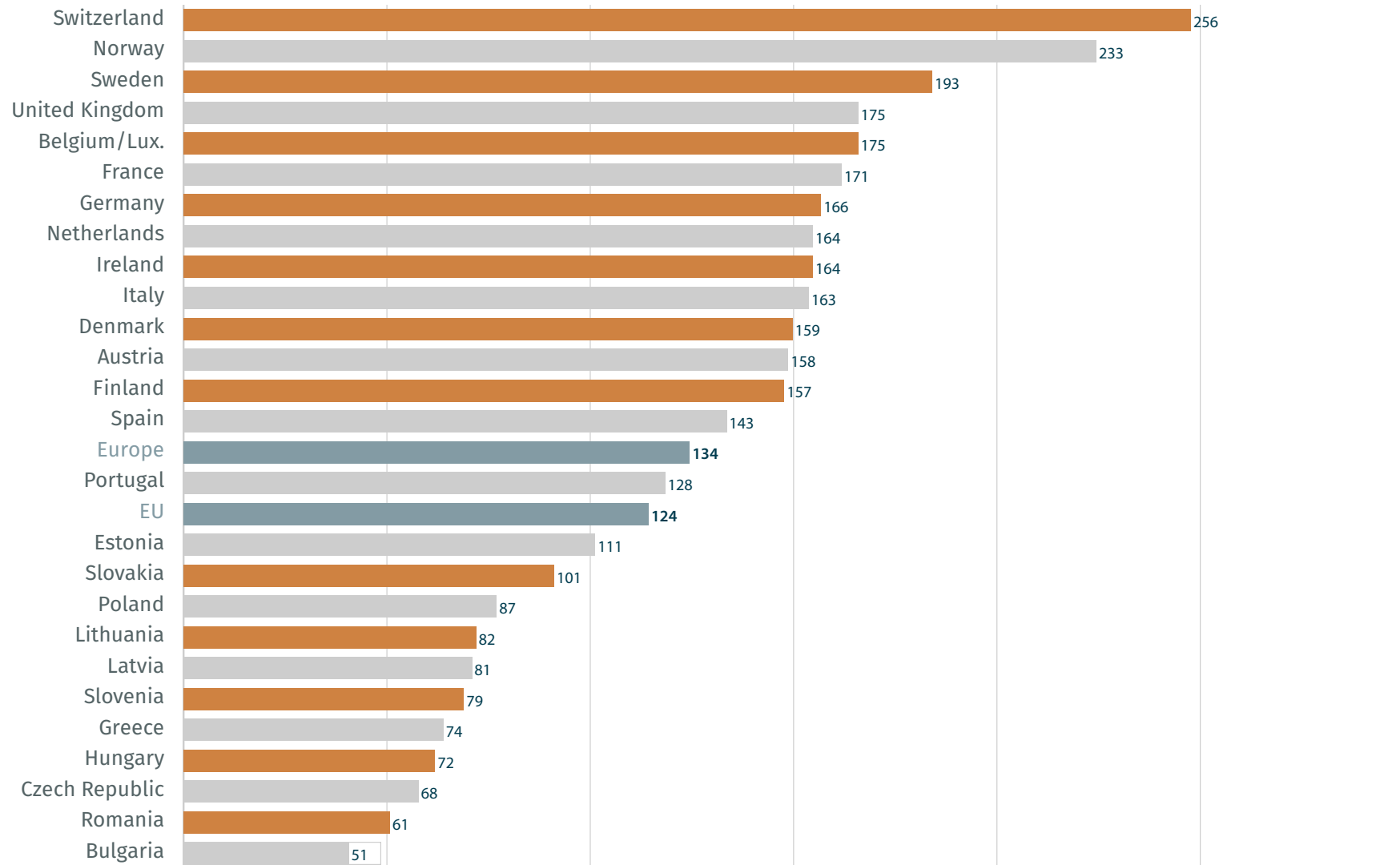
Retail Sales Price (RSP) in Euros



Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016: PER CAPITA CONSUMPTION BY COUNTRY

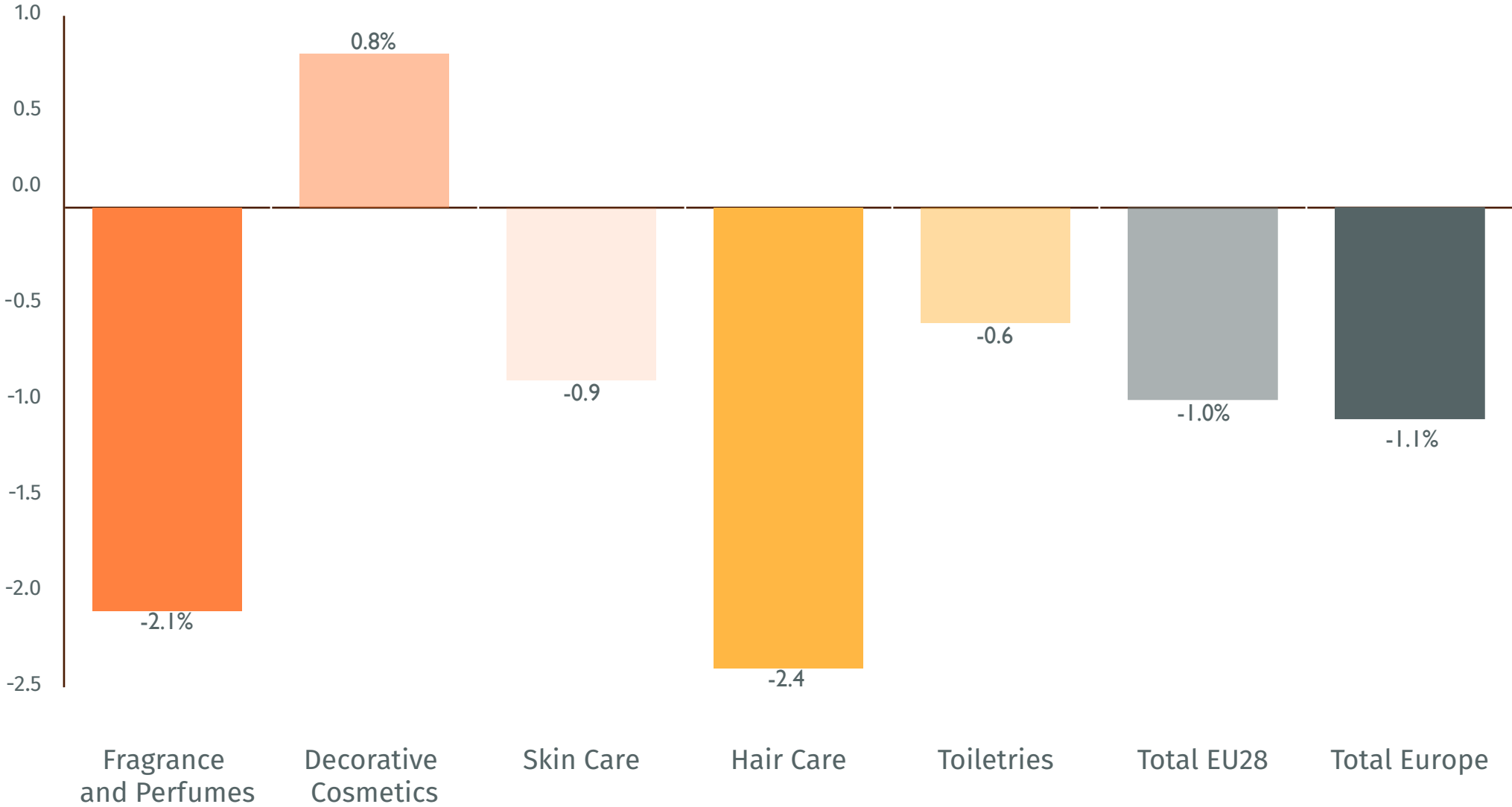
Retail Sales Price (RSP) in Euros



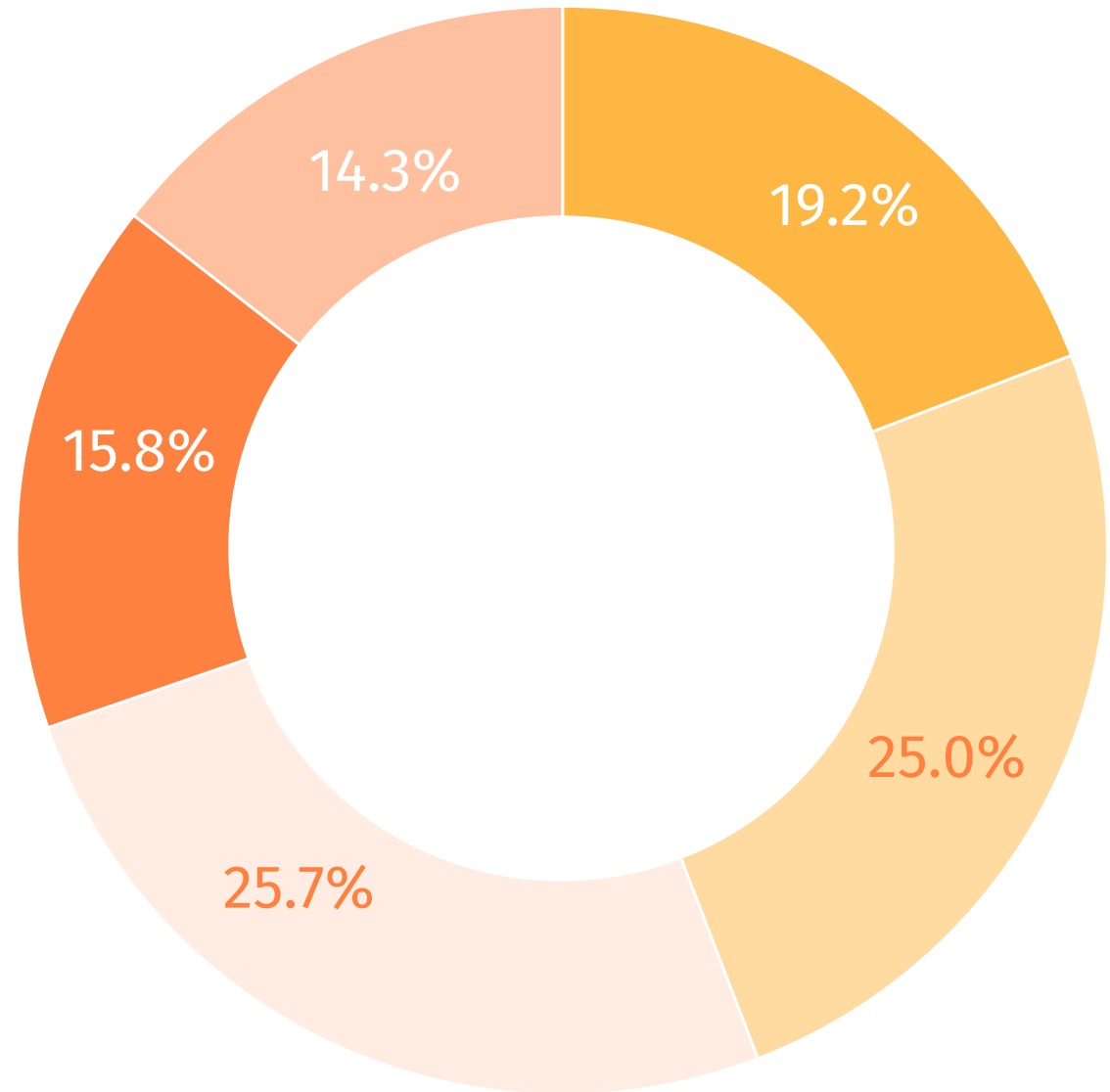
Source: Cosmetics Europe, Euromonitor International

EUROPEAN C&T MARKET 2016: MARKET CHANGES BY PRODUCT CATEGORY (%)

Retail Sales Price (RSP) in Euros



Source: Cosmetics Europe

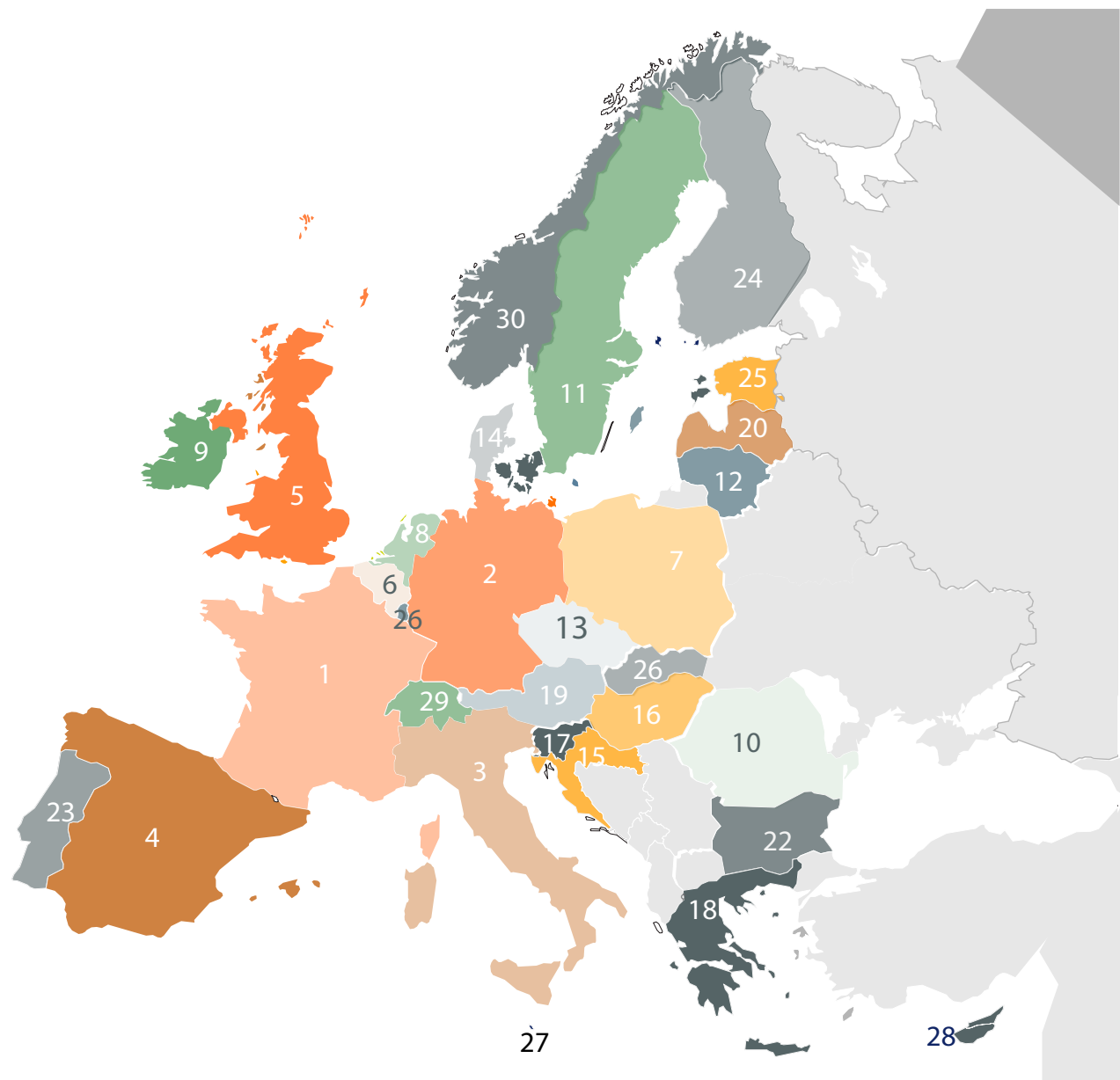


Source: Cosmetics Europe

EXTRA EUROPE 30 EXPORT

European C&T export in 2016: 18.2 billion* - The European market represented almost one third of the global market

Country	2016
1. France	6,144.4
2. Germany	2,850.8
3. Italy	1,766.6
4. Spain	1,532.2
5. UK	1,342.2
6. Belgium	1,117.6
7. Poland	883.3
8. Netherlands	574.3
9. Ireland	246.8
10. Romania	209.8
11. Sweden	183.9
12. Lithuania	126.0
13. Czech Republic	139.4
14. Denmark	120.4
15. Croatia	74.3
16. Hungary	72.3
17. Slovenia	60.3
18. Greece	53.2
19. Austria	50.7
20. Latvia	49.4
21. Slovakia	20.0
22. Bulgaria	35.7
23. Portugal	34.7
24. Finland	25.0
25. Estonia	20.1
26. Luxembourg	9.4
27. Malta	5.2
28. Cyprus	1.8
29. Switzerland	477.7
30. Norway	1.4
EUROPE 30	18,228.9 EUR mn

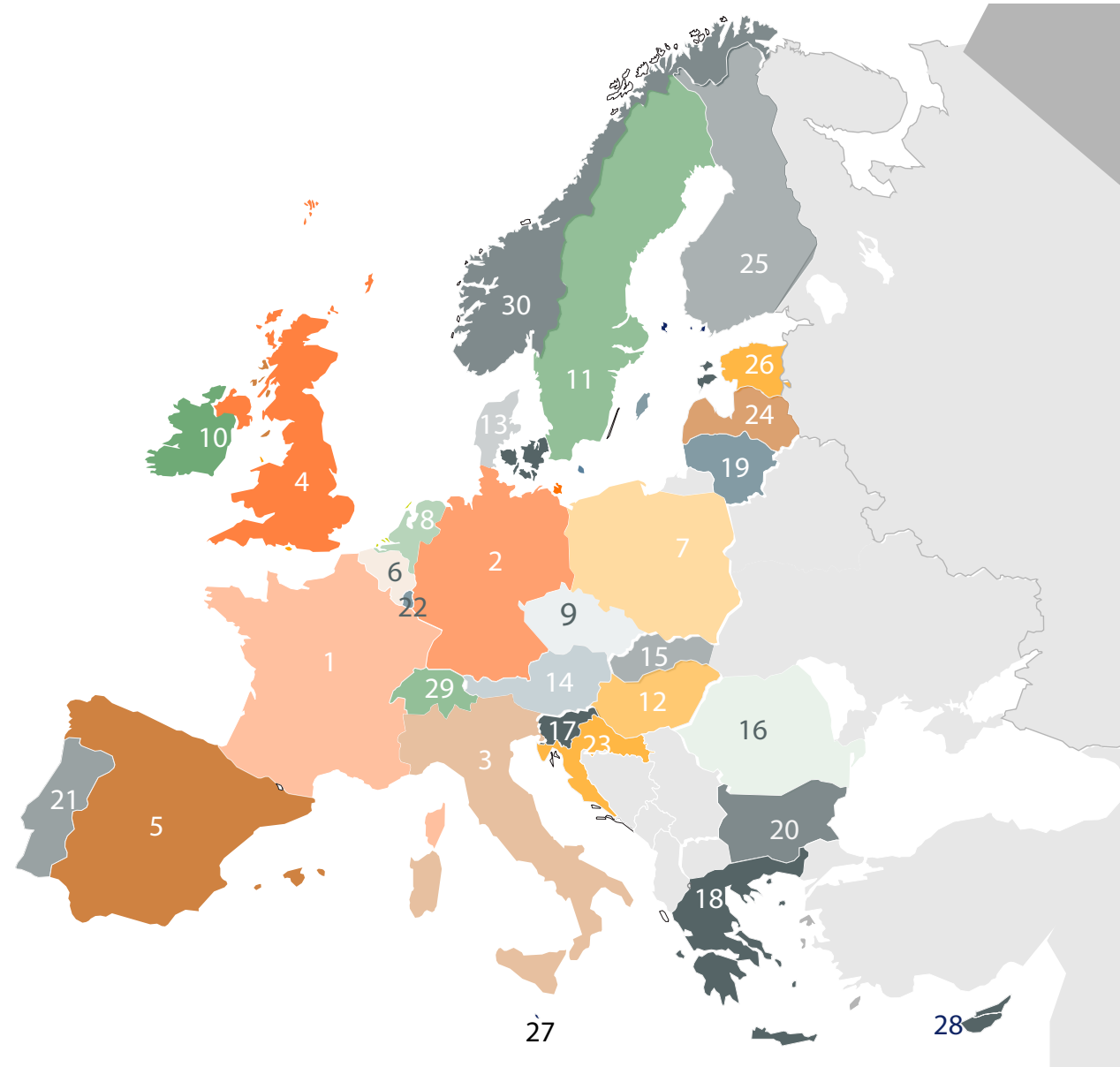


*Value Retail RSP, EUR bn; includes; Decorative cosmetics, Hair care, Fragrances, Skin care and Toiletries
 Source: Cosmetics Europe, Euromonitor International

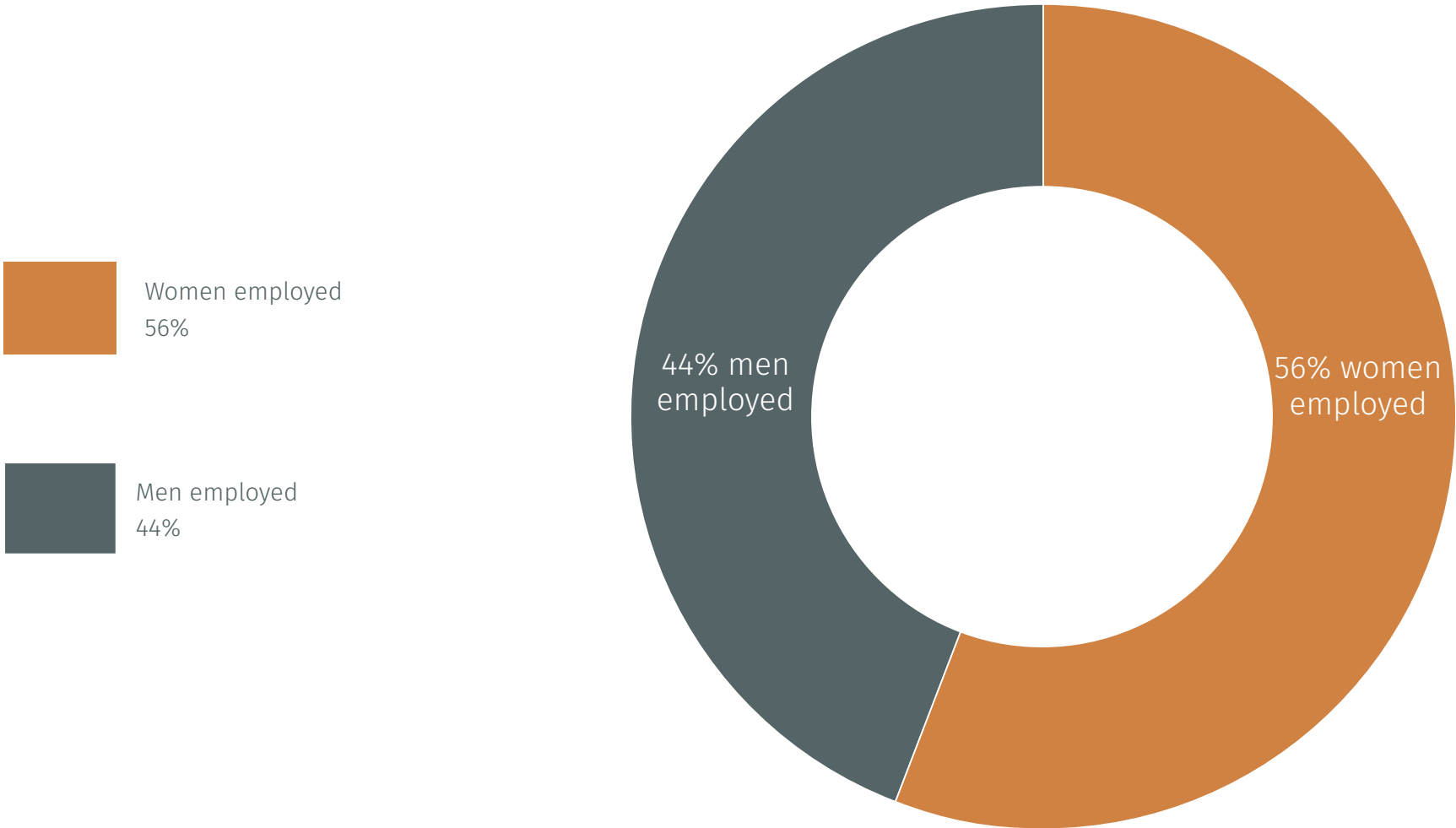
TOTAL EXPORT EUROPE 30

European C&T export in 2016: EUR 43.4 billion* - The European market represented almost one third of the global market

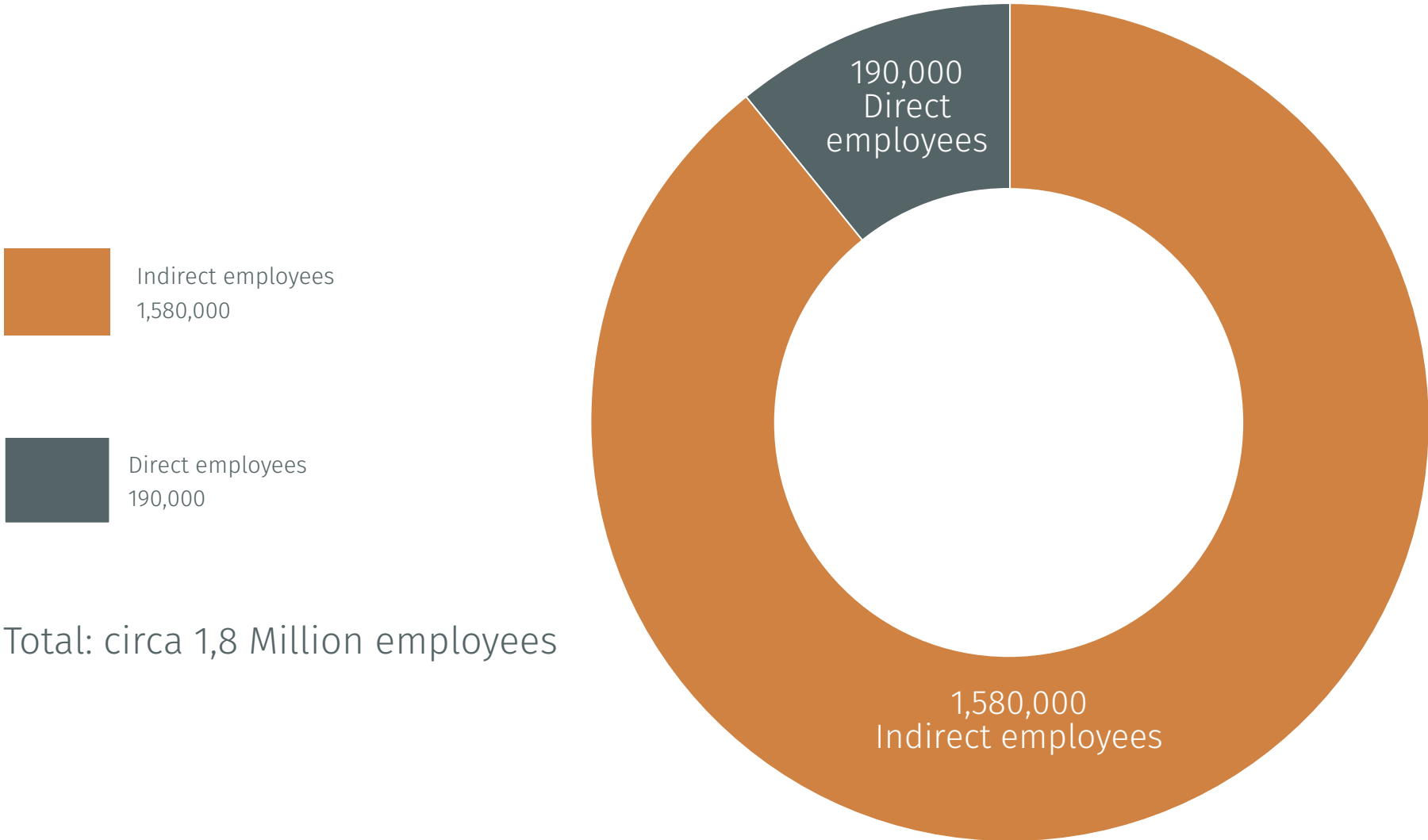
Country	2016
1. France	11,838.8
2. Germany	7,308.9
3. Italy	4,153.0
4. UK	4,046.5
5. Spain	2,987.8
6. Belgium	2,686.1
7. Poland	2,535.1
8. Netherlands	2,074.2
9. Czech Republic	784.6
10. Ireland	526.9
11. Sweden	371.5
12. Hungary	346.2
13. Denmark	345.9
14. Austria	312.5
15. Slovakia	285.6
16. Romania	285.5
17. Slovenia	253.4
18. Greece	206.9
19. Lithuania	177.7
20. Bulgaria	160.6
21. Portugal	142.2
22. Luxembourg	121.9
23. Croatia	118.0
24. Latvia	88.5
25. Finland	51.5
26. Estonia	41.1
27. Malta	9.0
28. Cyprus	6.2
29. Switzerland	1,111.1
30. Norway	32.2
EUROPE 30	43,409.4 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 2016 the European cosmetics industry employs approximately 1,700,000 people including: 27,800 scientists

There are 512,000 life sciences students in Europe

Source: Euromonitor International

EUROPEAN C&T MARKET 2014-2016:

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

Countries	National Currencies	2014 billion		2015 billion		2016 billion		2016/15 +/- %	
		RSP	MSP	RSP	MSP	RSP	MSP	RSP	MSP
Austria	€	1.345	0.841	1.346	0.841	1.376	0.863	2.3	2.5
Belgium/Lux.	€	2.043	1.141	2.057	1.141	2.080	1.163	1.1	1.1
Bulgaria	BGN	0.634	0.411	0.650	0.411	0.720	0.467	10.7	10.7
Czech Republic	CZK	19.680	12.300	19.244	12.300	19.334	12.084	0.5	0.5
Denmark	DKK	7.557	3.943	7.902	3.943	6.747	3.525	-14.6	-14.4
Estonia	€ 2012	0.114	0.063	0.120	0.063	0.125	0.070	4.7	7.7
Finland	€	0.894	0.447	0.912	0.447	0.862	0.431	-0.9	-0.9
France	€	10.583	6.444	11.357	6.444	11.392	6.904	0.3	0.3
Germany	€	13.012	8.395	13.388	8.395	13.603	8.776	1.6	1.6
Greece	€	0.807	0.600	0.804	0.600	0.798	0.593	-0.7	-0.7
Hungary	HUF	195.978	110.671	211.547	110.671	219.751	130.604	3.9	10.1
Ireland	€	0.687	0.417	0.756	0.417	0.777	0.468	2.8	2.7
Italy	€	9.392	6.145	9.706	6.145	9.890	6.320	0.5	0.5
Latvia	LVL	0.144	0.077	0.155	0.077	0.160	0.084	3.3	2.6
Lithuania	LTL	0.644	0.341	0.697	0.341	0.814	0.426	16.8	16.0
Netherlands	€	2.823	1.580	2.859	1.580	2.783	1.555	-2.7	-2.7
Poland	PLN	12.360	8.147	12.819	8.147	14.425	9.423	12.5	11.5
Portugal	€	1.277	0.795	1.289	0.795	1.322	0.822	2.6	2.4
Romania	RON	4.839	2.751	5.279	2.751	5.448	3.174	3.2	5.0
Slovakia	€	0.518	0.316	0.531	0.316	0.548	0.333	0.0	0.0
Slovenia	EUR	0.162	0.094	0.165	0.094	0.163	0.094	-1.4	-1.4
Spain	€	6.350	4.002	6.447	4.002	6.657	4.180	3.2	3.7
Sweden	SEK	16.346	9.362	18.256	9.362	17.991	10.292	-1.5	-1.5
United Kingdom	GBP	8.381	4.656	9.102	4.656	9.379	5.211	0.1	0.1
Norway	NOK	10.535	5.276	10.725	5.276	10.965	5.492	4.6	4.6
Switzerland	CHF	2.439	1.523	2.409	1.523	2.323	1.434	-4.0	-3.9

* Professional hair care included

Source: Cosmetics Europe and Euromonitor International

EUROPEAN C&T MARKET 2014-2016: Market volume by country (RSP)

Country	2014 billion EUROS	2015 billion EUROS	2016 billion EUROS	16/15 +/- %	2016 % share
Germany	13.012	13.388	13.603	1.6	17.7
France	10.583	11.357	11.392	0.3	14.9
United Kingdom	10.397	12.537	11.445	-11.4	14.9
Italy	9.392	9.706	9.890	0.5	12.9
Spain	6.350	6.448	6.657	3.2	8.7
Netherlands	2.823	2.859	2.783	-2.7	3.6
Poland	2.954	3.064	3.306	7.9	4.3
Belgium/Lux	2.043	2.057	2.080	1.1	2.7
Sweden	1.797	1.952	1.900	-2.6	2.5
Portugal	1.277	1.289	1.322	2.3	1.7
Austria	1.345	1.346	1.376	2.6	1.8
Denmark	1.014	1.059	0.907	-14.3	1.2
Greece	0.807	0.804	0.798	-0.7	1.0
Finland	0.894	0.912	0.862	-0.9	1.1
Romania	1.089	1.188	1.213	2.2	1.6
Czech Republic	0.715	0.705	0.715	1.4	0.9
Hungary	0.635	0.682	0.706	3.5	0.9
Ireland	0.687	0.756	0.777	2.8	1.0
Slovakia	0.518	0.531	0.548	3.3	0.7
Bulgaria	0.324	0.332	0.368	16.8	17.2
Lithuania	0.187	0.202	0.236	16.8	0.3
Slovenia	0.162	0.165	0.163	-1.4	0.2
Latvia	0.144	0.155	0.160	3.3	0.2
Estonia	0.114	0.120	0.125	4.7	0.2
EU (excluding Malta/Cyprus)	69.262	73.613	73.334	-1.0	95.6
Switzerland	2.008	2.256	2.134	-5.8	2.8
Norway	1.261	1.198	1.215	3.7	1.6
Europe	72.531	77.067	76.683	-1.1	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2014-2016: Market volume by country (MSP)

Country	2014 billion EUROS	2015 billionEUROS	2016 billion EUROS	16/15 +/- %	2016 % share
Germany	8.434	8.637	8.776	1.6	18.8
France	6.890	6.886	6.904	0.3	14.8
Italy	6.145	6.288	6.320	0.5	13.6
United Kingdom	6.283	7.173	6.358	-11.4	13.6
Spain	3.969	4.030	4.180	3.7	9.0
Poland	1.942	2.021	2.160	6.9	4.6
Netherlands	1.580	1.599	1.555	-2.7	3.3
Belgium/Lux	1.141	1.150	1.163	1.1	2.5
Sweden	1.134	1.117	1.087	-2.7	2.3
Portugal	0.807	0.803	0.822	2.4	1.8
Austria	0.847	0.842	0.863	2.5	1.9
Greece	0.600	0.598	0.593	-0.7	1.3
Denmark	0.529	0.552	0.474	-14.2	1.0
Romania	0.626	0.680	0.707	4.0	1.5
Czech Republic	0.447	0.441	0.447	1.4	1.0
Finland	0.468	0.435	0.431	-0.9	0.9
Ireland	0.444	0.456	0.468	2.7	1.0
Hungary	0.359	0.383	0.420	9.7	0.9
Slovakia	0.318	0.323	0.333	2.7	0.7
Bulgaria	0.213	0.216	0.239	3.1	0.5
Lithuania	0.101	0.106	0.123	10.7	0.3
Slovenia	0.095	0.095	0.094	16.0	0.2
Latvia	0.078	0.082	0.084	2.6	0.2
Estonia	0.063	0.065	0.070	7.7	0.2
EU (excluding Malta/Cyprus)	43.512	44.976	44.670	-0.7	95.9
Switzerland	1.254	1.397	1.318	-5.7	2.8
Norway	0.632	0.587	0.609	3.7	1.3
Europe	45.397	46.959	46.596	-0.8	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016:

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

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1.749	1.710	3.151	3.003	3.990	13.603
France	2.230	1.443	3.424	1.692	2.604	11.392
United Kingdom	2.206	2.005	2.636	1.954	2.644	11.445
Italy	1.227	1.548	2.689	1.821	2.605	9.890
Spain	1.245	0.649	1.886	1.249	1.628	6.657
Netherlands	0.445	0.447	0.592	0.549	0.750	2.783
Poland	0.505	0.433	0.788	0.699	0.881	3.306
Belgium/Lux	0.380	0.241	0.523	0.539	0.397	2.080
Sweden	0.165	0.528	0.530	0.335	0.343	1.900
Greece	0.076	0.078	0.269	0.215	0.160	0.798
Austria	0.197	0.208	0.354	0.272	0.345	1.376
Portugal	0.221	0.092	0.381	0.233	0.395	1.322
Denmark	0.145	0.147	0.201	0.196	0.219	0.907
Romania	0.284	0.157	0.255	0.209	0.308	1.213
Czech Republic	0.091	0.111	0.165	0.165	0.184	0.715
Finland	0.037	0.164	0.218	0.257	0.185	0.862
Hungary	0.095	0.085	0.155	0.114	0.257	0.706
Ireland	0.120	0.114	0.167	0.160	0.216	0.777
Slovakia	0.086	0.078	0.121	0.105	0.159	0.548
Bulgaria	0.056	0.052	0.079	0.078	0.104	0.368
Lithuania	0.048	0.034	0.060	0.040	0.054	0.236
Slovenia	0.019	0.021	0.049	0.031	0.042	0.163
Latvia	0.034	0.018	0.038	0.038	0.033	0.160
Estonia	0.022	0.019	0.038	0.023	0.023	0.125
EU (excluding Malta/Cyprus)	11.683	10.381	18.768	13.977	18.524	73.333
Switzerland	0.336	0.326	0.642	0.468	0.362	2.134
Norway	0.064	0.262	0.330	0.245	0.315	1.215
Europe	12.083	10.969	19.740	14.690	19.201	76.683

Source: Cosmetics Europe

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1.128	1.103	2.033	1.937	2.574	8.776
France	1.266	0.868	2.047	1.067	1.656	6.904
Italy	0.762	0.938	1.620	1.329	1.670	6.320
United Kingdom	1.225	1.114	1.465	1.086	1.469	6.359
Spain	0.785	0.410	1.183	0.784	1.019	4.180
Netherlands	0.224	0.220	0.338	0.354	0.419	1.555
Poland	0.297	0.286	0.524	0.461	0.592	2.160
Belgium/Lux	0.217	0.124	0.277	0.301	0.244	1.163
Greece	0.051	0.058	0.192	0.154	0.139	0.593
Sweden	0.083	0.297	0.297	0.198	0.213	1.087
Austria	0.116	0.134	0.227	0.170	0.216	0.863
Portugal	0.131	0.057	0.236	0.148	0.250	0.822
Denmark	0.073	0.077	0.104	0.102	0.119	0.474
Romania	0.156	0.094	0.149	0.124	0.184	0.707
Czech Republic	0.057	0.069	0.103	0.103	0.115	0.447
Finland	0.019	0.082	0.109	0.129	0.093	0.431
Hungary	0.055	0.047	0.088	0.070	0.159	0.420
Ireland	0.063	0.069	0.101	0.099	0.136	0.468
Slovakia	0.052	0.047	0.074	0.063	0.097	0.333
Bulgaria	0.036	0.033	0.051	0.051	0.068	0.239
Lithuania	0.023	0.017	0.029	0.023	0.031	0.123
Slovenia	0.010	0.012	0.028	0.018	0.025	0.094
Latvia	0.017	0.010	0.021	0.020	0.017	0.084
Estonia	0.011	0.011	0.022	0.013	0.014	0.070
EU (excluding Malta/Cyprus)	6.853	6.177	11.318	8.804	11.518	44.670
Switzerland	0.177	0.233	0.356	0.293	0.259	1.317
Norway	0.032	0.131	0.166	0.122	0.157	0.608
Europe	7.062	6.541	11.840	9.219	11.933	46.595

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016:

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

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	12.9	12.6	23.2	22.1	29.3	100.0
France	19.6	12.7	30.1	14.9	22.9	100.0
United Kingdom	19.3	17.5	23.0	17.1	23.1	100.0
Italy	12.4	15.7	27.2	18.4	26.3	100.0
Spain	18.7	9.7	28.3	18.8	24.5	100.0
Netherlands	16.0	16.1	21.3	19.7	26.9	100.0
Poland	15.3	13.1	23.8	21.1	26.7	100.0
Belgium/Lux	18.3	11.6	25.1	25.9	19.1	100.0
Sweden	8.7	27.8	27.9	17.6	18.1	100.0
Greece	9.5	9.8	33.7	27.0	20.0	100.0
Austria	14.3	15.1	25.7	19.8	25.0	100.0
Portugal	16.7	6.9	28.8	17.7	29.9	100.0
Denmark	15.9	16.2	22.2	21.6	24.2	100.0
Romania	23.4	12.9	21.0	17.3	25.4	100.0
Czech Republic	12.8	15.5	23.0	23.0	25.7	100.0
Finland	4.3	19.0	25.3	29.8	21.5	100.0
Hungary	13.5	12.0	22.0	16.1	36.4	100.0
Ireland	15.4	14.7	21.5	20.5	27.8	100.0
Slovakia	15.7	14.2	22.0	19.1	29.0	100.0
Bulgaria	15.2	14.0	21.4	21.3	28.2	100.0
Lithuania	20.4	14.6	25.5	16.8	22.7	100.0
Slovenia	11.9	12.8	30.1	19.2	25.9	100.0
Latvia	20.9	11.3	23.7	23.7	20.4	100.0
Estonia	17.7	15.3	30.1	18.5	18.5	100.0
EU (excluding Malta/Cyprus)	15.9	14.2	25.6	19.1	25.3	100.0
Switzerland	15.7	15.3	30.1	21.9	17.0	100.0
Norway	5.3	21.5	27.1	20.2	25.9	100.0
Europe	15.8	14.3	25.7	19.2	25.0	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016:

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

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	12.9	12.6	23.2	22.1	29.3	100.0
France	18.3	12.6	29.7	15.5	24.0	100.0
Italy	12.1	14.8	25.6	21.0	26.4	100.0
United Kingdom	19.3	17.5	23.0	17.1	23.1	100.0
Spain	18.8	9.8	28.3	18.7	24.4	100.0
Netherlands	14.4	14.2	21.8	22.8	26.9	100.0
Poland	13.7	13.2	24.3	21.3	27.4	100.0
Belgium/Lux	18.7	10.7	23.8	25.9	20.9	100.0
Sweden	7.6	27.3	27.3	18.2	19.6	100.0
Greece	8.6	9.7	32.4	25.9	23.4	100.0
Austria	13.4	15.5	26.3	19.7	25.1	100.0
Portugal	15.9	7.0	28.8	18.0	30.4	100.0
Denmark	15.3	16.2	22.0	21.5	25.0	100.0
Romania	22.0	13.3	21.1	17.6	26.0	100.0
Czech Republic	12.8	15.5	23.0	23.0	25.7	100.0
Finland	4.3	19.0	25.3	29.9	21.5	100.0
Hungary	13.1	11.3	20.9	16.8	37.9	100.0
Ireland	13.5	14.6	21.7	21.1	29.1	100.0
Slovakia	15.7	14.2	22.1	19.0	29.1	100.0
Bulgaria	14.9	14.0	21.3	21.4	28.4	100.0
Lithuania	18.2	13.7	23.8	18.7	25.5	100.0
Slovenia	10.6	13.0	30.2	19.6	26.6	100.0
Latvia	19.7	11.6	24.3	23.8	20.6	100.0
Estonia	14.9	15.6	30.9	19.1	19.5	100.0
EU (excluding Malta/Cyprus)	15.3	13.8	25.3	19.7	25.8	100.0
Switzerland	13.4	17.7	27.1	22.2	19.6	100.0
Norway	5.3	21.6	27.2	20.1	25.7	100.0
Europe	15.2	14.0	25.4	19.8	25.6	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016:

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

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	14.5	15.6	16.0	20.4	20.8	17.7
France	18.5	13.2	17.3	11.5	13.6	14.9
United Kingdom	18.3	18.3	13.4	13.3	13.8	14.9
Italy	10.2	14.1	13.6	12.4	13.6	12.9
Spain	10.3	5.9	9.6	8.5	8.5	8.7
Netherlands	3.7	4.1	3.0	3.7	3.9	3.6
Poland	4.2	4.0	4.0	4.8	4.6	4.3
Belgium/Lux	3.1	2.2	2.6	3.7	2.1	2.7
Sweden	1.4	4.8	2.7	2.3	1.8	2.5
Greece	0.6	0.7	1.4	1.5	0.8	1.0
Austria	1.6	1.9	1.8	1.9	1.8	1.8
Portugal	1.8	0.8	1.9	1.6	2.1	1.7
Denmark	1.2	1.3	1.0	1.3	1.1	1.2
Romania	2.4	1.4	1.3	1.4	1.6	1.6
Czech Republic	0.8	1.0	0.8	1.1	1.0	0.9
Finland	0.3	1.5	1.1	1.8	1.0	1.1
Hungary	0.8	0.8	0.8	0.8	1.3	0.9
Ireland	1.0	1.0	0.8	1.1	1.1	1.0
Slovakia	0.7	0.7	0.6	0.7	0.8	0.7
Bulgaria	0.5	0.5	0.4	0.5	0.5	0.5
Lithuania	0.4	0.3	0.3	0.3	0.3	0.3
Slovenia	0.2	0.2	0.2	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	0.1	0.2
EU (excluding Malta/Cyprus)	96.7	94.6	95.1	95.1	96.5	95.5
Switzerland	2.8	3.0	3.3	3.2	1.9	2.8
Norway	0.5	2.4	1.7	1.7	1.6	1.6
Europe		100.0	100.0	100.0	100.0	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016:

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

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	16.0	16.9	17.2	21.0	21.6	18.8
France	17.9	13.3	17.3	11.6	13.9	14.8
Italy	10.8	14.3	13.7	14.4	14.0	13.6
United Kingdom	17.3	17.0	12.4	11.8	12.3	13.6
Spain	11.1	6.3	10.0	8.5	8.5	9.0
Netherlands	3.2	3.4	2.9	3.8	3.5	3.3
Poland	4.2	4.4	4.4	5.0	5.0	4.6
Belgium/Lux	3.1	1.9	2.3	3.3	2.0	2.5
Sweden	1.2	4.5	2.5	2.1	1.8	2.3
Greece	0.7	0.9	1.6	1.7	1.2	1.3
Austria	1.6	2.0	1.9	1.8	1.8	1.9
Portugal	1.8	0.9	2.0	1.6	2.1	1.8
Denmark	1.0	1.2	0.9	1.1	1.0	1.0
Romania	2.2	1.4	1.3	1.3	1.5	1.5
Czech Republic	0.8	1.1	0.9	1.1	1.0	1.0
Finland	0.3	1.3	0.9	1.4	0.8	0.9
Hungary	0.8	0.7	0.7	0.8	1.3	0.9
Ireland	0.9	1.0	0.9	1.1	1.1	1.0
Slovakia	0.7	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	0.3	0.3
Slovenia	0.1	0.2	0.2	0.2	0.2	0.2
Latvia	0.2	0.1	0.2	0.2	0.1	0.2
Estonia	0.1	0.2	0.2	0.1	0.1	0.2
EU (excluding Malta/Cyprus)	97.0	94.4	95.6	95.5	96.5	95.9
Switzerland	2.5	3.6	3.0	3.2	2.2	2.8
Norway	0.5	2.0	1.4	1.3	1.3	1.3
Europe	100.0	100.0	100.0	100.0	100.0	100.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016:

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

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1,749.0	1,710.0	3,151.0	3,003.0	3,990.0	13,603.0
France	2,229.8	1,443.2	3,423.6	1,692.2	2,603.5	11,392.3
United Kingdom	2,205.5	2,004.8	2,636.0	1,954.0	2,644.2	11,444.5
Italy	1,227.2	1,548.4	2,688.6	1,821.3	2,604.9	9,890.4
Spain	1,245.4	649.0	1,885.7	1,249.1	1,627.6	6,656.9
Netherlands	445.0	447.0	592.0	549.0	750.0	2,783.0
Poland	504.6	433.3	788.2	698.9	881.2	3,306.2
Belgium/Lux	380.0	241.0	523.0	539.0	397.0	2,080.0
Sweden	164.5	527.6	530.3	334.7	343.0	1,900.2
Greece	76.2	78.0	268.8	215.2	159.9	798.1
Austria	196.8	208.3	354.4	272.3	344.6	1,376.4
Portugal	220.5	91.6	381.1	233.3	395.3	1,321.8
Denmark	144.6	146.6	201.2	195.8	219.2	907.4
Romania	284.2	157.0	255.1	209.4	307.7	1,213.4
Czech Republic	91.4	111.1	164.7	164.6	183.5	715.3
Finland	37.4	163.8	218.1	257.2	185.3	861.8
Hungary	95.3	84.5	155.1	114.0	257.1	706.0
Ireland	120.0	114.4	167.3	159.6	215.6	776.9
Slovakia	86.0	77.9	120.8	104.7	158.9	548.3
Bulgaria	55.9	51.5	78.6	78.2	103.8	368.0
Lithuania	48.2	34.3	60.2	39.5	53.5	235.7
Slovenia	19.4	20.9	49.0	31.2	42.2	162.7
Latvia	33.5	18.1	37.9	38.0	32.6	160.1
Estonia	22.1	19.1	37.6	23.2	23.1	125.1
EU (excluding Malta/Cyprus)	11,682.6	10381.4	18,768.3	13,977.4	18,523.8	73,333.5
Switzerland	336.1	326.1	641.6	468.1	362.2	2,134.1
Norway	64.3	261.5	329.6	244.9	314.7	1,215.0
Europe	12,082.9	10969.0	19,739.6	14,690.4	19,200.6	76,682.6

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016:

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

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1,128.4	1,103.2	2,032.9	1,937.4	2,574.2	8,776.1
France	1,266.0	867.7	2,047.2	1,067.0	1,656.2	6,904.1
Italy	762.2	938.4	1,619.6	1,329.4	1,669.8	6,319.5
United Kingdom	1,225.3	1,113.8	1,464.5	1,085.6	1,469.0	6,358.2
Spain	784.5	409.7	1,182.5	783.5	1,019.3	4,179.5
Netherlands	223.6	220.2	338.3	354.2	419.0	1,555.3
Poland	296.5	285.8	524.4	460.8	592.4	2,159.9
Belgium/Lux	217.1	124.2	276.7	301.1	243.6	1,162.8
Sweden	83.1	296.8	296.7	197.5	212.8	1,087.0
Greece	50.8	57.8	192.0	153.7	139.0	593.3
Austria	115.8	133.9	227.0	169.7	216.4	862.8
Portugal	130.6	57.2	236.4	148.1	249.7	822.0
Denmark	72.6	76.7	104.2	102.0	118.5	474.0
Romania	155.8	94.0	149.2	124.3	183.5	706.8
Czech Republic	57.1	69.4	102.9	102.9	114.7	447.0
Finland	18.7	81.9	109.0	128.6	92.6	430.8
Hungary	55.0	47.4	87.8	70.4	159.0	419.6
Ireland	63.0	68.5	101.4	98.8	136.1	467.8
Slovakia	52.2	47.4	73.5	63.3	96.9	333.3
Bulgaria	35.6	33.4	50.8	51.0	67.9	238.7
Lithuania	22.5	16.9	29.4	23.1	31.4	123.3
Slovenia	9.9	12.2	28.2	18.3	24.9	93.5
Latvia	16.6	9.8	20.5	20.1	17.4	84.4
Estonia	10.5	11.0	21.7	13.4	13.7	70.3
EU (excluding Malta/Cyprus)	6,853.5	6,177.4	11,316.9	8,804.3	11,518.0	44,670.0
Switzerland	176.9	232.9	356.4	292.6	258.7	1,317.5
Norway	32.5	131.4	165.7	122.4	156.6	608.5
Europe	7,062.9	6,541.7	11,838.9	9,219.3	11,933.3	46,596.0

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2016:

Changes in national markets by product category 2016/2015 (%) Euros / RSP basis

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1.5	6.5	0.4	-0.9	2.5	1.6
France	-1.1	0.2	-0.2	-1.2	3.4	0.3
United Kingdom	-10.5	-7.9	-12.1	-12.5	-13.0	-11.4
Italy	1.8	0.5	0.3	-0.7	0.8	0.5
Spain	4.1	8.0	3.9	0.8	2.0	3.2
Netherlands	-1.5	-0.4	-3.9	-3.0	-3.4	-2.7
Poland	10.4	6.6	11.4	9.3	3.2	7.9
Belgium/Lux	2.6	2.6	-0.3	0.6	1.6	1.1
Sweden	-34.9	5.8	2.4	-2.2	0.8	-2.6
Greece	1.2	2.6	-1.0	-2.5	-0.3	-0.7
Austria	-0.3	0.7	5.2	1.0	2.9	2.3
Portugal	1.9	6.6	2.7	4.3	0.9	2.6
Denmark	-24.8	-12.3	-13.9	-20.6	-0.1	-14.3
Romania	-0.4	-3.1	17.0	2.6	-3.3	2.2
Czech Republic	0.4	4.1	1.0	0.5	1.4	1.4
Finland	5.4	6.0	-0.5	-6.1	-0.7	-0.9
Hungary	1.5	4.8	1.1	2.9	5.5	3.5
Ireland	1.5	3.8	2.9	3.4	2.5	2.8
Slovakia	1.4	3.9	2.0	9.5	1.1	3.3
Bulgaria	14.5	9.8	9.2	12.0	9.4	10.7
Lithuania	7.1	21.2	34.7	23.4	3.3	16.8
Slovenia	-1.5	-4.1	-0.2	-1.6	-1.2	-1.4
Latvia	3.1	4.6	1.1	8.9	-0.6	3.3
Estonia	2.3	4.4	8.7	5.0	0.9	4.7
EU (excluding Malta/Cyprus)	-2.1	0.7	-0.8	-2.2	-0.6	-1.0
Switzerland	-5.7	-3.7	-6.9	-7.1	-4.0	-5.8
Norway	12.8	12.5	3.2	-5.9	4.1	3.7
Europe	-2.1	0.8	-0.9	-2.4	-0.6	-1.1

Source: Cosmetics Europe

Country	Fragrances Perfumes	Decorative Cosmetics	Skin Care	Hair Care	Toiletries	Total
Germany	1.5	6.5	0.4	-0.9	2.5	1.6
France	-1.1	0.1	-0.1	-1.6	3.2	0.3
Italy	1.7	0.5	0.5	-0.9	1.1	0.5
United Kingdom	-10.5	-7.9	-12.1	-12.5	-13.0	-11.4
Spain	4.9	9.1	4.2	1.2	2.2	3.7
Netherlands	-1.5	-0.4	-3.9	-3.0	-3.4	-2.7
Poland	10.3	5.7	10.6	7.2	2.7	6.9
Belgium/Lux	2.6	2.6	-0.3	0.6	1.6	1.1
Sweden	-36.9	5.5	1.6	-1.7	0.8	-2.7
Greece	1.2	2.6	-1.0	-2.5	-0.3	-0.7
Austria	-0.3	0.5	6.5	1.0	2.6	2.5
Portugal	1.7	6.5	2.6	4.1	0.7	2.4
Denmark	-24.9	-12.3	-14.0	-20.6	-0.1	-14.2
Romania	1.0	0.2	18.4	4.4	-1.7	4.0
Czech Republic	0.4	4.0	1.0	0.6	1.3	1.4
Finland	5.6	6.0	-0.5	-6.1	-0.8	-0.9
Hungary	8.7	12.9	8.4	7.6	10.7	9.7
Ireland	1.3	3.0	3.0	3.3	2.5	2.7
Slovakia	1.6	3.9	2.1	8.4	0.9	3.1
Bulgaria	14.8	9.5	9.2	11.8	9.5	10.7
Lithuania	6.6	20.7	33.0	22.9	3.6	16.0
Slovenia	-2.9	-6.2	-1.4	0.5	0.4	-1.4
Latvia	2.5	3.2	0.5	7.5	-0.6	2.6
Estonia	-1.9	5.8	11.3	10.7	8.7	7.7
EU (excluding Malta/Cyprus)	-1.7	1.0	-0.4	-1.9	-0.2	-0.7
Switzerland	-5.7	-3.7	-6.9	-7.1	-3.9	-5.7
Norway	12.8	12.5	3.2	-5.9	4.1	3.7
Europe	-1.7	1.0	-0.6	-2.2	-0.3	-0.8

Source: Cosmetics Europe

EUROPEAN C&T MARKET 2014-2016:

Per capita consumption by country - Euros / RSP basis

Country	2014	2015	2016
Sweden	205	200	193
Belgium/Lux	174	174	175
United Kingdom	175	199	175
France	172	171	171
Germany	162	165	166
Netherlands	167	169	164
Ireland	160	163	164
Italy	156	162	163
Denmark	180	187	159
Austria	159	157	158
Finland	172	159	157
Spain	137	139	143
Portugal	124	124	128
Slovakia	97	98	101
Estonia	87	91	111
Poland	78	81	87
Lithuania	65	69	82
Latvia	74	78	81
Slovenia	80	80	79
Greece	73	74	74
Hungary	64	69	72
Czech Republic	68	67	68
Romania	55	60	61
Bulgaria	45	46	51
Average EU (excluding Malta/Cyprus/Croatia)	122	124	124
Switzerland	248	275	256
Norway	245	227	233
Europe	132	134	134

Source: Cosmetics Europe

POPULATION 2014-2016 BY COUNTRY

In millions of inhabitants

Country	2014	2015	2016
Germany	80,767	81,198	82,176
France	65,942	66,488	66,760
United Kingdom	64,511	64,875	65,383
Italy	60,795	60,796	60,666
Spain	46,464	46,450	46,446
Poland	38,018	38,006	37,967
Romania	19,947	19,871	19,760
Netherlands	16,864	16,901	16,979
Greece	10,993	10,858	10,784
Belgium/Lux	11,715	11,821	11,887
Czech Republic	10,524	10,538	10,554
Portugal	10,427	10,375	10,341
Hungary	9,877	9,856	9,830
Sweden	9,645	9,747	9,851
Austria	8,537	8,576	8,690
Bulgaria	7,233	7,202	7,154
Denmark	5,643	5,660	5,707
Finland	5,462	5,472	5,487
Slovakia	5,416	5,421	5,426
Ireland	4,606	4,629	4,725
Lithuania	2,943	2,921	2,889
Slovenia	2,061	2,063	2,064
Latvia	1,995	1,986	1,969
Estonia	1,316	1,315	1,132
EU - 28 (excluding Malta/Cyprus/Croatia)	501,702	503,024	504,627
Switzerland	8,081	8,238	8,327
Norway	5,138	5,166	5,211
Europe	514,921	516,428	518,165

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

GROSS DOMESTIC PRODUCT 2014-2016 BY COUNTRY

Euros / Billions

Country	2014	2015	2016
	(extracted 170515)	(extracted 120416)	(extracted 130417)
Germany	2903.8	3025.9	3133.7
United Kingdom	2222.4	2567.5	2366.9
France	2142.0	2183.6	2225.3
Italy	1616.3	1636.4	1672.4
Spain	1058.5	1081.2	1113.9
Netherlands	655.4	678.6	697.2
Belgium/Lux	447.0	461.9	476.2
Sweden	429.5	444.2	462.5
Poland	413.1	427.8	424.6
Austria	329.0	337.2	349.5
Denmark	257.4	266.0	277.2
Finland	204.0	207.2	214.1
Ireland	185.4	189.1	265.8
Greece	179.1	176.0	175.9
Portugal	173.1	179.4	184.9
Romania	150.0	159.8	169.1
Czech Republic	141.0	156.2	174.4
Hungary	103.3	108.8	112.5
Slovakia	75.2	78.1	81.0
Bulgaria	42.0	44.2	47.4
Slovenia	37.3	38.5	39.8
Lithuania	36.3	37.2	38.6
Latvia	24.1	24.4	25.0
Estonia	19.5	19.5	20.9
Croatia (new)	43.1	43.9	45.6
EU - 28 (excluding Malta/Cyprus)	13,887.7	14,572.4	14,794.2
Switzerland	506.2	581.5	600.9
Norway	377.2	350.9	344.8
Europe	14,771.2	15,504.9	15,739.8

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

Country	National currency	2014	2015	2016
		<i>for reference</i>		
Bulgaria	BGN	1.9558	1.9558	1.9558
Czech Republic	SIT	27.5356	27.2790	27.0310
Denmark	DKK	7.4548	7.4590	7.4360
Estonia	EKK / € 2012	1.0000	1.0000	1.0000
Hungary	HUF	308.7061	310.0000	311.2578
Latvia	LVL / € 2014	1.0000	1.0000	1.0000
Lithuania	LTL	3.4528	3.4528	3.4528
Norway	NOK	8.3544	8.9500	9.0250
Poland	PLN	4.1843	4.1843	4.3630
Romania	RON	4.4437	4.4450	4.4899
Slovakia	SKK / € 2009	1.0000	1.0000	1.0000
Sweden	SEK	9.0985	9.3540	9.4678
Switzerland	CHF	1.2146	1.0680	1.0883
United Kingdom	GBP	0.8061	0.7260	0.8195
Japan	YEN	1.4031	1.3431	1.2243
USA	US\$	1.3285	1.1100	1.1072

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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