

Beauty and Personal Care Retailing - Spain - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Beauty and personal care specialists will have to offer a more compelling in-store and online experience in the next few years if they are to fend off the competitive challenge from non-specialist retailers. At the same time, they are going to have to adjust their business models to take into account consumers’ growing concern about environmental and ethical issues.”

– **Michael Oliver, Senior Retail Analyst**

This report looks at the following areas:

- Shoppers showing more interest in environmental and ethical issues
- The opportunity to consolidate the role of physical stores

The beauty and personal care market in Spain has continued to benefit from an improving economy and falling unemployment, with spending on personal care goods and services expected to have grown by 7.5% in 2018 to reach €19.8 billion.

After a wave of acquisitions in 2017, the beauty and personal care retailing sector in Spain went through a period of taking stock in 2018 as the acquirers digested and integrated their purchases into their operations. Market leader, Clarel has suffered from a stagnating market share in recent years and it looks like it may be sold by its indebted parent company, Dia. Meanwhile, its closest rivals, led by Douglas and followed by Druni and Maremor, have gained share.

Spanish beauty and personal care shoppers are becoming more concerned about the environmentally friendly and ethical credentials of the products they are buying, with 84% wanting retailers to offer more environmentally-friendly packaging options.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Beauty and Personal Care Retailing - Spain - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Areas covered in this Report

Executive Summary

The market

Consumer spending
Figure 1: Spain: annual % change in total consumer spending on beauty and personal care and total household spending, 2013-18

Sector size
Figure 2: Spain: annual % change in retail sales, 2013-18

Inflation
Figure 3: Spain: consumer price inflation on personal care products and services, annual % change, 2013-18

Channels of distribution
Figure 4: Spain: estimated distribution of spending on beauty and personal care products by channel, 2017

Companies and brands

Leading players

Market shares
Figure 5: Spain: leading BPC specialists' shares of all cosmetics and perfumery specialists' sales, 2017/18

Online

The consumer

Beauty and personal care products purchased
Figure 6: Spain: beauty and personal care products purchased, October 2018

Online and in-store shopping for beauty and personal care products
Figure 7: Spain: in-store and online buyers of beauty and personal care products, October 2018

Where beauty and personal care products are purchased
Figure 8: Spain: where beauty and personal care products were purchased, October 2018

Attitudes to shopping for beauty and personal care products
Figure 9: Spain: attitudes to shopping for beauty and personal care products, October 2018

What we think

Issues and Insights

Shoppers showing more interest in environmental and ethical issues

The facts

The implications

The opportunity to consolidate the role of physical stores

The facts

The implications

The Market – What You Need to Know

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Beauty and Personal Care Retailing - Spain - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Personal care spending growing at above-average rate

Fragrances is biggest and fastest-growing sector

Specialist retailers see modest sales growth

Inflation has limited impact on beauty

Specialists battling hypermarkets/supermarkets

Consumer Spending

Personal care spending growing at above-average rate

Figure 10: Spain: consumer spending on beauty and personal care (incl. VAT), 2013-18

Product market breakdown

Figure 11: Spain: main beauty and personal care markets, spending (incl. VAT), 2013-18

Figure 12: Spain: main beauty and personal care markets, forecast spending (incl. VAT), 2019-22

Sector Size and Forecast

Figure 13: Spain: health & beauty specialists, sales, excl. VAT, 2014-18

Figure 14: Spain: health & beauty retailers, forecast sales, excl. VAT, 2019-23

Inflation

Figure 15: Spain: consumer prices of personal care items, annual % change, 2013-18

Figure 16: Spain: consumer price inflation on personal care products and services, annual % change, January 2017-November 2018

Channels of Distribution

Figure 17: Spain: estimated distribution of spending on beauty and personal care products by channel, 2017

Figure 18: Spain: estimated distribution of spending on beauty and personal care products by channel, 2015-17

Companies and Brands – What You Need to Know

Industry takes stock after frenetic period of consolidation

Market leader Clarel under pressure and up for sale

Competition intensifies

Online sales still relatively undeveloped

Leading Players

Industry takes stock after frenetic period of consolidation

Figure 19: Spain: leading beauty and personal care specialists, sales, 2014/15-2017/18

Figure 20: Spain: leading beauty and personal care specialists, outlets, 2014/15-2017/18

Figure 21: Spain: leading beauty specialists, sales per outlet, 2015/16-2017/18

Market Shares

Figure 22: Spain: leading specialists' shares of all cosmetics and perfumery specialists' sales, 2014/15-2017/18

Online

Online activity

Shopping online

Figure 23: Spain: online purchases in the last 12 months in key sectors, 2008-18

Online sales

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Beauty and Personal Care Retailing - Spain - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 24: Spain: estimated online sales by product category, 2017

Leading online players

Figure 25: Spain: beauty retailers: transactional websites, January 2019

The Consumer – What You Need to Know

Older women are important buyers

Just a quarter buy online

Supermarkets/hypermarkets are the most popular places to buy

Environmental and ethical concerns coming to the fore

Beauty and Personal Care Products Purchased

Beauty and personal care products have almost universal purchasing

Figure 26: Spain: beauty and personal care products purchased in the last 12 months, October 2018

Fragrances/aftershaves most likely to be bought by men

Figure 27: Spain: beauty and personal care products purchased in the last 12 months, by gender, October 2018

Older women are important buyers of beauty and personal care products

Figure 28: Spain: beauty and personal care products purchased, by age group, October 2018

Online and In-store Shopping for Beauty and Personal Care Products

Little change in online shopper numbers

Figure 29: Spain: in-store and online buyers of beauty and personal care products, October 2018

Women are bigger online shoppers

Figure 30: Spain: in-store and online buyers of beauty and personal care products, by gender, October 2018

Family drives online purchasing

Figure 31: Spain: in-store and online buyers of beauty and personal care products, by age group, October 2018

Online sales in some segments being boosted by tutorials

Figure 32: Spain: beauty and personal care products bought in the last 12 months, in-store vs online, October 2018

Where Beauty and Personal Care Products are Purchased

Supermarkets/hypermarkets are the dominant source of purchase

Figure 33: Spain: where beauty and personal care products were purchased, October 2018

Primor's appeal is with younger customers

Figure 34: Spain: where beauty and personal care products were purchased, by age and income, October 2018

Where people shopped and what they bought

Products and specialists

Figure 35: Spain: BPC products purchased by retailer used, deviation from average: specialists, October 2018

Figure 36: Spain: BPC products purchased by retailer used, deviation from average: non-specialists, October 2018

Attitudes to Shopping for Beauty and Personal Care Products

Environmental and ethical concerns coming to the fore

Figure 37: Spain: attitudes to buying beauty and personal care products, October 2018

Interest in ethical production and natural ingredients is broadly spread

Figure 38: Spain: attitudes to buying beauty and personal care products, by age group, October 2018

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Beauty and Personal Care Retailing - Spain - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Data sources

AS Watson

What we think

Diverse collection of businesses

Recent focus on service and online

Marionnaud a poor fit for AS Watson structure

Where next?

Company background

Company performance

Figure 39: AS Watson (Europe): group financial performance, 2013-17

Figure 40: AS Watson (Europe): outlet data, 2013-17

Retail offering

Rossmann

Kruidvat and Superdrug

Savers and Prijsmepper

Other businesses

Figure 41: AS Watson Europe, operating companies, 2017

Clarel

What we think

Dia wants to sell Clarel

Overstored?

Company background

Company performance

Figure 42: Clarel, gross sales, 2013-17

Figure 43: Clarel: outlet data, 2013-17

Retail offering

Douglas Group

What we think

New CEO's bold new strategy to rejuvenate and reposition the brand more upmarket

Modernising bricks-and-mortar stores

Website enhancements help grow online sales

Innovative and exclusive product mix

High value of Beauty Card members

Company background

Company performance

Figure 44: Douglas Group: group sales performance, 2013/14-2017/18

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Beauty and Personal Care Retailing - Spain - January 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 45: Douglas Group: estimated outlet data, 2013/14-2017/18

Retail offering

Kiko Milano

What we think

Hits the buffers in key markets including US, UK and Germany

Injection of capital will allow it to retarget its expansion

Online offers wide international coverage but some stores will be necessary

Company background

Company performance

Figure 46: Kiko Milano: group financial performance, 2013-17

Figure 47: Kiko Milano: outlet data, 2013-17

Retail offering

Sephora

What we think

Continuous product launches help drive success

Pursuing new expansion in Germany and Russia

Use of technology and service drives store appeal

Company background

Company performance

Figure 48: Sephora: group financial performance, 2013-17

Figure 49: Sephora: outlet data, 2013-17

Retail offering

Yves Rocher

What we think

Focused on creating a more immersive in-store experience

Creative pop-up store and bespoke off-site experiences

Acquisition to boost market penetration outside the euro area

Alternative packaging breakthrough to reduce ecological footprint

Company background

Company performance

Figure 50: Rocher Groupe: estimated group sales performance, 2014-18

Figure 51: Rocher Groupe: estimated outlet data, 2014-18

Retail offering

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com