

## Beauty and Personal Care Retailing - Europe - January 2019

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“Beauty and personal care products (BPC) retailing is more varied around Europe than almost any other sector. From drugstores in Germany to supermarkets in other countries, the market is largely in the hands of non-specialists.”

– **Richard Perks, Director of retail research**

This report looks at the following areas:

This report examines the beauty and personal care retailing market across Europe, focussing mainly on the Big 5 economies: the UK, France, Germany, Italy and Spain.

The data in its entirety is contained in the five-country report, which gives a full overview of beauty retailing in these markets. It also includes market data for the rest of Europe’s leading economies and the leading retailers table is pan-European.

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

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### What we think

Lush responds to consumer demand with its 'Community Products'

Lush goes packaging-free

Lush enables customers to make their own bath bombs

Wales' first Lush Spa Shop opens in Cardiff

### Company background

### Company performance

Figure 301: Lush Retail Ltd: group financial performance, 2013/14-2017/18

Figure 302: Lush Retail Ltd: outlet data, 2013/14-2017/18

### Retail offering

## Müller

### What we think

Succession solution could lead to greater dynamism

Heading off discount grocery threat is a challenge

Likely to move ahead in online retail

Assortment facing much-needed shakeup

### Company background

### Company performance

Figure 303: Müller: group financial performance, 2013/14-2017/18

Figure 304: Müller: outlet data, 2013/14-2017/18

### Retail offering

## Rossmann

### What we think

Slow pace of refurbishment holds dangers for space productivity

Search for differentiation moves away from price

Connecting with younger customers remains a priority

### Company background

### Company performance

Figure 305: Rossmann: group sales performance, 2013-17

Figure 306: Rossmann: outlet data, 2013-17

### Retail offering

## Sephora

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### 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 307: Sephora: group financial performance, 2013-17

Figure 308: Sephora: outlet data, 2013-17

### Retail offering

## Walgreens Boots Alliance

### What we think

- Few tangible signs of merger benefits
- UK and European markets too mature to be the strategic focus
- Online under pressure from all sides

### Company background

### Company performance

Figure 309: Walgreens Boots Alliance (UK and Europe): group sales performance, 2013/14-2017/18

Figure 310: Walgreens Boots Alliance (UK and Europe): outlet data, 2013/14-2017/18

### 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 311: Rocher Groupe: estimated group sales performance, 2014-18

Figure 312: Rocher Groupe: estimated outlet data, 2014-18

### Retail offering

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