

Men's and Women's Fragrances - UK - September 2012

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"Fragrances have proved more resilient than functional toiletries. Their luxury cachet, aspirational appeal and emotional connection with consumers have all ensured that fragrances remain a dressing table staple."

- **Alexandra Richmond, Head of Beauty and Personal Care**



In this report we answer the key questions:

- Will value growth be sustained?
- Is eco-friendliness really an issue?
- Are there any Olympic opportunities?
- Signature scents or brand associations?

The UK retail market for fragrances continued to grow in 2011, in spite of a challenging economic setting, with sales up by 4.5% to reach around £1.38 billion. While growth continues, it is doing so at a slower rate. The recession has proved that the 'lipstick effect' works, where women are treating themselves to affordable, little luxuries when money is tight whilst cutting back on bigger purchases, but there are signs of the prestige sector moving towards lower price points. In spite of this, sales of fine fragrances remain substantially larger than the mass market, generating 82% of market value, the bulk of which comes from female-specific products.

This report examines the UK market for men's and women's fragrances including Eaux de Toilette, Eaux de Parfum and colognes:

- Eaux de Parfums (EdP) have an 8-15% concentration of essence.
- Eaux de Toilettes (EdT) have a 4-8% concentration of essence.
- Colognes, often referred to as Eaux de Cologne, have a 3-5% concentration of essence.
- Due to the importance of the Lynx brand and its wider use as a fragrance rather than a deodorant, especially among younger men, for the purposes of this report, body sprays are included in the definition of men's fragrances for market data purposes. Please note that this differs to the women's fragrance market, which does not include body sprays.

The words "perfume" or "scent" are sometimes used as synonyms for fragrance. To avoid confusion, this report uses the terms perfume, eau de parfum, eau de toilette, cologne and, as a generic term, the word "fragrance".

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