

Men's and Women's Fragrances - UK - August 2013

Report Price: £1750.00 | \$2834.04 | €2223.04

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"Most consumers prefer to test fragrance before they buy, resulting in sales from bricks and mortar stores eclipsing online retail for fragrances. However, encouraging more buyers to venture online could result in boosted sales for completely new or niche perfumes."

– Lucy Cornford – Senior Beauty Analyst

In this report we answer the key questions:

- Could growing concerns over allergens be a blow for perfume?
- How are celebrity fragrances evolving?
- Branded or bespoke?
- How can new digital advances benefit the fragrance industry and consumers?

The UK fragrance market slowed in terms of growth in 2012 to £1.42 billion whilst further growth is predicted through 2013 of 3.4% to £1.47 billion. The prestige sector continues to drive value sales (82% vs 18% for mass) as consumers continue to buy into inexpensive luxuries during times of economic hardship. However, growth has slowed in comparison with previous years as consumers look to take advantage of more discount deals and loyalty schemes.

The market remains focussed on women's fragrances, which account for the majority of value sales, although men's products are beginning to pick up the pace with growth of 4.5% estimated for 2013 thanks to a host of high profile fragrances for men in recent years.

Usage remains high for all adults at 91%, but shoppers remain relatively uneducated on fragrances and strong opportunities for growth await the retailers or brands that can successfully increase consumer knowledge about fragrances. The wide selection of scents and strengths available prove as much of a hindrance as a help to today's consumer, whilst the young orientation of advertising further alienates older fragrance users. Launches largely rely on branding and celebrity to attract interest, although scents are also becoming increasingly more unusual to create a point of differentiation. New introductions include fragrances based on the smell of books, the ballet and even the internet.

Seasonal editions remain a key portion of the market, accounting for one in five fragrance launches in 2012. Such products offer limited commitment by manufacturers and appeal to users who want to vary their scent throughout the year or take advantage of gifting options. Almost half of adults (45%) bought perfume or aftershave or toiletries as gifts for Christmas 2012.

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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