

United Kingdom Fragrance Market Segmented By Product Type (Deodorants and Perfumes), By Consumer Group (Male, Female, Unisex), By Price (Luxury & Mass), By Sales Channel (Supermarkets/Hypermarkets, Exclusive Stores, Online, and Others), By Region, Competition, Forecast and Opportunities, 2019-2029F

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Abstracts

United Kingdom Fragrance Market was valued at USD 2.39 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 6.23% through 2029. The United Kingdom fragrance market is a dynamic and thriving industry that reflects a long history of perfume appreciation, changing consumer preferences, and a diverse array of scents and products.

The United Kingdom fragrance market encompasses a wide range of scented products, including perfumes, colognes, body sprays, scented oils, and various ancillary products like scented candles and home fragrances. It is a vibrant part of the broader beauty and personal care industry, designed to enhance personal grooming, self-expression, and create pleasant sensory experiences.

Several renowned global fragrance brands, including Chanel, Dior, Gucci, and Est?e Lauder, have a significant presence in the UK market. These luxury brands offer high-end perfumes and colognes that cater to consumers seeking premium, long-lasting scents. Additionally, the market also features popular mass-market brands such as Calvin Klein, Davidoff, and Hugo Boss, which offer affordable yet quality fragrances.

As environmental consciousness grows, there is an increasing demand for sustainable

and eco-friendly fragrance products. Brands are incorporating sustainable sourcing and packaging practices, such as recyclable materials and responsible ingredient harvesting. There is a growing movement towards unisex and gender-neutral fragrances. Brands are challenging traditional gender stereotypes by creating scents that appeal to a broad audience, emphasizing individual preference over gender.

Customization is a key trend in the fragrance market. Companies are offering bespoke scent experiences, allowing customers to blend their unique fragrances, personalizing their olfactory journey. Consumers are gravitating towards fragrances made from natural ingredients. Brands are incorporating botanicals, essential oils, and clean ingredients into their formulations to meet the demand for more natural and less synthetic scents.

The UK has a rich history of perfume appreciation dating back centuries. This cultural appreciation for fragrances continues to drive consumer interest and purchases in the modern market. Fragrances offer a means of personal expression and self-identity. They evoke memories, set moods, and make a statement about an individual's character and style. The convenience of online shopping and the availability of fragrances through e-commerce have expanded consumer access to a wide range of scents. Moreover, the in-store experience at dedicated perfume boutiques and counters remains integral to the fragrance market.

In conclusion, the United Kingdom fragrance market is a flourishing and multifaceted industry deeply rooted in tradition, personal expression, and cultural appreciation for scents. Its significant market size, the presence of both luxury and mass-market players, evolving consumer preferences, and driving factors such as e-commerce and gifting culture collectively make it a vibrant and enduring segment of the beauty and personal care industry in the UK.

Key Market Drivers

Changing Consumer Preferences and Lifestyle Trends

One of the primary drivers of the United Kingdom's fragrance market is the continuous evolution of consumer preferences and lifestyle trends. Consumers today are more diverse, informed, and discerning when it comes to their fragrance choices. Several trends are shaping the fragrance market in response to these changing preferences:

Sustainability and Natural Ingredients: There is a growing demand for eco-friendly and

sustainable fragrances. Consumers are increasingly concerned about the environmental impact of the fragrance industry, leading to a surge in natural and organic fragrance options. Brands are responding by incorporating sustainably sourced ingredients and eco-friendly packaging.

Personalization: Consumers are seeking personalized fragrance experiences. Brands are harnessing technology to create customized scents based on individual preferences. This trend not only enhances the consumer's connection to the product but also offers a unique and exclusive experience.

Niche and Artisanal Fragrances: There is a rising interest in niche and artisanal fragrances that offer distinct and unique scent profiles. These fragrances often have a compelling backstory and are appreciated by consumers looking for exclusivity and individuality in their fragrance choices.

Gender-Neutral Fragrances: The concept of gender-neutral fragrances is gaining popularity, challenging traditional gender-specific scents. These fragrances appeal to a broader audience and reflect changing societal norms and perceptions of gender.

Fragrance Layering: Fragrance layering, where consumers mix and match different scented products to create a unique scent profile, has become a popular trend. This approach allows individuals to express their creativity and customize their fragrance experience.

E-Commerce and Digital Transformation

The second driver of growth in the United Kingdom's fragrance market is the increasing influence of e-commerce and the ongoing digital transformation of the industry. The advent of online shopping and the digital landscape has transformed the way consumers discover, purchase, and engage with fragrances:

Online Shopping: E-commerce platforms and online retailers have provided consumers with easy access to a wide range of fragrances. The convenience of online shopping, including the ability to read reviews, compare prices, and access a broad selection of products, has driven sales in the fragrance market.

Digital Marketing: Fragrance brands are leveraging digital marketing strategies, including social media, influencer collaborations, and online advertising, to reach a broader audience and create brand awareness. Social media platforms like Instagram

have become influential in showcasing fragrance products and building brand loyalty.

Virtual Fragrance Try-On: Augmented reality (AR) and virtual try-on experiences allow consumers to sample fragrances virtually, enhancing the online shopping experience. This technology enables consumers to make more informed choices when selecting fragrances online.

Subscription Models: Fragrance subscription services have gained popularity, offering consumers the opportunity to explore new scents regularly. These subscription models often include samples of various fragrances, allowing customers to discover their favorites.

Globalization and Market Expansion

The United Kingdom's fragrance market is benefiting from globalization and expanding its reach beyond national borders. Several factors contribute to this driver of growth:

International Brands: The presence of international fragrance brands in the UK market has introduced consumers to a wide variety of scents from around the world. This has expanded consumer preferences and awareness of different fragrance types and ingredients.

Export Opportunities: The UK fragrance market is not only catering to domestic demand but also actively exporting its products to international markets. British fragrance brands are gaining recognition globally, contributing to the growth of the UK's fragrance industry.

Cultural Influences: The multicultural nature of the UK population has introduced a variety of cultural influences into the fragrance market. Consumers are exposed to different scent profiles and fragrance traditions, creating a more diverse and dynamic market.

Global Fragrance Ingredients: The use of fragrance ingredients sourced from various parts of the world has led to the creation of unique and exotic scents that resonate with consumers. The global availability of these ingredients has enriched the UK fragrance market.

Key Market Challenges

Regulatory and Safety Compliance

One of the major challenges in the United Kingdom fragrance market is regulatory and safety compliance. The fragrance industry is subject to stringent regulations designed to ensure the safety of consumers, protect the environment, and guarantee product quality. These regulations include the Registration, Evaluation, Authorization, and Restriction of Chemicals (REACH) legislation, which governs the use of chemicals in fragrances, and the Cosmetic Products Regulation (CPR) that specifies the requirements for labeling, safety assessment, and product testing.

Meeting these regulatory requirements can be a complex and costly process for fragrance manufacturers and distributors. They must conduct extensive safety assessments, provide comprehensive ingredient lists, and adhere to strict labeling guidelines. Moreover, regulations can change, adding an additional layer of complexity for businesses in the fragrance industry. Adapting to evolving regulations often necessitates reformulating products, which can be both time-consuming and expensive.

In recent years, there has been an increased focus on transparency and allergen labeling within fragrances. This requires manufacturers to list potential allergens in their products, which can be a challenge when a fragrance contains a complex mixture of ingredients. Compliance with these allergen regulations can result in reformulations, redesigning of product packaging, and additional testing.

Sustainability and Environmental Concerns

Sustainability is an overarching challenge for the United Kingdom fragrance market. Consumers are increasingly conscious of the environmental impact of their purchases, and they expect companies to adopt eco-friendly practices. The fragrance industry, like many others, faces pressure to reduce its carbon footprint, minimize waste, and adopt sustainable sourcing practices.

One of the primary environmental concerns in the fragrance market is related to the ingredients used in fragrance formulations. The extraction or synthesis of natural ingredients, such as essential oils, often has a significant environmental impact. Unsustainable harvesting practices and habitat destruction can result from the high demand for certain botanical ingredients. Additionally, the production of synthetic fragrances can involve the use of petrochemicals and energy-intensive processes.

The issue of packaging also poses a sustainability challenge. Many fragrances are sold

in elaborate and non-recyclable packaging, contributing to plastic waste and environmental degradation. Brands are increasingly under pressure to adopt more eco-friendly packaging solutions, such as refillable containers and reduced plastic use.

Moreover, consumers are advocating for cruelty-free and vegan fragrance products. Ensuring that no animal testing is involved in fragrance development can be a challenge, as it often involves cooperation with suppliers and adherence to international standards.

Market Saturation and Consumer Preferences

The United Kingdom fragrance market is highly competitive and has become saturated with a vast array of fragrance options. This saturation poses a challenge for both established and emerging brands. With numerous choices available, consumers have high expectations regarding product quality, uniqueness, and value.

Consumer preferences in fragrances can be fickle, driven by trends, seasons, and changing fashion or lifestyle choices. Brands must continuously innovate and adapt to remain relevant and meet the evolving demands of their target audience. This often involves the development of new scent profiles, packaging designs, and marketing strategies.

Furthermore, the COVID-19 pandemic has disrupted consumer behavior and reduced the demand for fragrances, as many people have been working from home and attending fewer social events. The challenge for the fragrance market is to adapt to these changing consumer habits and find new ways to engage and connect with customers.

Key Market Trends

Sustainable and Natural Fragrances

One of the most prominent trends in the United Kingdom's fragrance market is the growing demand for sustainable and natural fragrances. Consumers are becoming increasingly aware of the environmental and health impacts of synthetic fragrances and are seeking alternatives that are eco-friendly and less harmful to their skin.

As a response to this demand, many fragrance brands are shifting their focus towards sustainable and natural ingredients. These fragrances are often crafted using natural

essential oils, organic botanical extracts, and responsibly sourced materials. They avoid harsh chemicals and synthetic compounds commonly found in traditional perfumes, making them a healthier and more environmentally friendly choice.

In addition to the ingredients, sustainable packaging is another critical aspect of this trend. Brands are adopting eco-conscious packaging, including recyclable materials, minimalistic designs, and refillable options. By reducing their carbon footprint and embracing sustainability, fragrance companies aim to appeal to a growing segment of eco-conscious consumers.

The rise of sustainability in the fragrance market aligns with broader consumer preferences for clean and green beauty products. Brands that commit to transparent and sustainable practices are likely to gain a competitive edge as consumers increasingly consider the environmental and ethical impact of their purchases.

Customizable Fragrances

Customization has emerged as a significant trend in the United Kingdom's fragrance market. Today's consumers are looking for unique, personalized scents that reflect their individuality. This trend has been facilitated by advancements in technology and the rise of niche fragrance brands that offer tailored fragrance experiences.

Brands are leveraging innovative technologies, such as AI-driven scent profiling and scent-matching algorithms, to help consumers create their personalized fragrances. These systems take into account individual preferences, skin chemistry, and lifestyle factors to recommend or formulate a bespoke fragrance. Additionally, brands often offer a wide range of fragrance notes and ingredients, allowing customers to mix and match to create a scent that resonates with their unique personality.

Customizable fragrances are often available in various forms, including perfumes, colognes, and even scented body lotions or candles. This trend not only enhances the consumer's sense of individuality but also creates a more interactive and engaging shopping experience. It's a departure from the one-size-fits-all approach traditionally associated with fragrance, offering a personalized touch that appeals to a diverse customer base.

Gender-Neutral Fragrances

The concept of gender-neutral fragrances has gained significant traction in the United

Kingdom, reflecting changing societal attitudes toward gender and self-expression. The fragrance industry is moving away from rigid gender-based marketing and formulations, and instead embracing inclusivity and diversity.

Gender-neutral fragrances are designed to be appealing and suitable for anyone, regardless of their gender identity. They often feature balanced and versatile scent profiles that can be worn by individuals of any gender. This trend not only aligns with the growing awareness of the fluidity of gender but also addresses consumer preferences for fragrances that transcend traditional stereotypes.

Many brands are now launching gender-neutral fragrance lines and marketing them as such. This approach reflects the desire to cater to a broader audience and challenge conventional norms. Gender-neutral fragrances often incorporate a range of notes and ingredients that are universally appealing and can be embraced by anyone who enjoys the scent.

Moreover, gender-neutral fragrances align with the minimalist and decluttering movements, as they offer a streamlined approach to fragrance purchasing. Rather than categorizing fragrances by gender, brands are simplifying their offerings and promoting the idea that scent is a personal choice, not dictated by societal expectations.

Segmental Insights

Product Type Insights

Perfumes have long held a distinguished place within the United Kingdom fragrance market, and their enduring popularity and influence continue to shape the industry. The fragrance market, which encompasses a wide array of scented products such as perfumes, colognes, body mists, and more, is marked by a distinctive preference for perfumes. This article explores the significant share that perfumes maintain in the United Kingdom's fragrance market and the key factors contributing to their continued dominance.

Perfumes offer a multisensory experience that captivates consumers. The art of crafting intricate fragrance compositions that engage both the olfactory and emotional senses sets perfumes apart. The allure of applying a few spritzes of a high-quality perfume and enjoying its long-lasting scent is a captivating aspect for fragrance enthusiasts. Perfumes serve as a means of personal expression. The choice of fragrance reflects an individual's personality, style, and mood. Whether it's a romantic, floral scent or a bold,

woody fragrance, perfumes allow individuals to communicate their uniqueness and make a memorable impression.

Perfumes often offer a touch of luxury and sophistication. High-end fragrances from renowned brands provide a sense of opulence, making them a desirable choice for special occasions and daily wear alike. The perception of luxury is a significant driver behind the popularity of perfumes. Perfumes are versatile and adaptable to various occasions and seasons. With a wide range of fragrance families, such as floral, oriental, fresh, and fruity, consumers can find perfumes that suit their preferences for any setting, whether it's a formal event, a casual outing, or a cozy winter evening.

Perfumes are known for their longevity, with many premium options lasting throughout the day. The sillage, or trail of scent left behind, is equally crucial for consumers who wish to leave a lasting impression. Perfumes excel in this regard, ensuring that their captivating aroma lingers.

Fragrance houses continuously introduce new and innovative perfume formulations, exploring unique scent combinations, packaging, and marketing strategies. This constant innovation keeps the perfume market dynamic and exciting, driving consumer interest and demand. The rise of niche and artisanal perfume brands caters to consumers seeking distinctive and exclusive scents. These brands often prioritize the use of high-quality ingredients and offer limited-edition fragrances, appealing to perfume connoisseurs.

The growth of e-commerce has made it easier for consumers to explore and purchase perfumes from the comfort of their homes. Online fragrance retailers provide detailed descriptions, customer reviews, and samples, enabling consumers to make informed choices. Personalized perfume experiences, such as choosing custom scents or layering fragrances, are gaining traction. These options allow consumers to create a unique olfactory identity, fostering a deeper connection to perfumes.

Perfumes continue to be a popular gift choice for various occasions, further solidifying their presence in the market. Brands often release special edition and gift sets to capitalize on this gifting culture.

Sales Channel Insights

The United Kingdom's fragrance market is marked by significant transformations, with online retail emerging as a dominant and influential force. In recent years, the digital

landscape has reshaped the way consumers discover, purchase, and interact with fragrances, revolutionizing the fragrance market in the UK. This article delves into the reasons behind the online sector's growing share and impact on the fragrance market in the UK.

E-commerce, particularly in the beauty and fragrance sector, has witnessed an extraordinary surge in the United Kingdom. The digital marketplace has been a game-changer, as consumers increasingly turn to online platforms to explore and purchase fragrances. Several key factors contribute to e-commerce's dominance in the fragrance market:

Convenience and Accessibility: Online shopping offers unmatched convenience and accessibility. Consumers can browse a vast array of fragrance products from the comfort of their homes or on their mobile devices. This accessibility has transcended geographical boundaries, allowing individuals from all corners of the UK to access a wide selection of fragrances.

Extensive Product Range: Online retailers, both major and niche, provide an extensive product range of fragrances. This diversity allows consumers to explore traditional perfumes, niche scents, designer fragrances, and exclusive launches, which may not be readily available in brick-and-mortar stores.

Detailed Information and Reviews: Online platforms empower consumers with comprehensive information about fragrances. Detailed descriptions, ingredient lists, and customer reviews offer valuable insights, helping buyers make informed decisions based on their preferences and skin chemistry.

Exclusive Online Offers: Many brands and retailers offer exclusive online promotions and deals. These incentives, such as discounts, sample giveaways, and loyalty programs, encourage consumers to make online purchases and enhance the overall shopping experience.

Contactless Shopping: The convenience of contactless shopping during the COVID-19 pandemic further accelerated the shift to online fragrance purchases. Consumers found online shopping to be a safe and efficient way to continue indulging in their fragrance preferences without physical store visits.

Product Personalization: Some online fragrance retailers offer tools and quizzes to help customers discover fragrances tailored to their preferences. This personalization adds a

layer of engagement and helps consumers find fragrances that resonate with them.

The presence of fragrances on social media and the influence of beauty and fragrance influencers have also played a significant role in online dominance. Platforms like Instagram, YouTube, and TikTok have become stages for fragrance reviews, recommendations, and unboxings. Influencers collaborate with brands to promote new scents and provide in-depth insights, thereby driving consumer interest and purchases.

While the online fragrance market in the United Kingdom is flourishing, it does face certain challenges. These include concerns related to counterfeit products, fragrance authenticity, and the inability to physically smell fragrances before purchasing. However, innovative solutions like virtual try-ons and augmented reality experiences are mitigating some of these issues.

Regional Insights

The United Kingdom fragrance market is a thriving and dynamic sector within the broader beauty and personal care industry. While it encompasses the entire UK, England stands out as a significant contributor, holding a substantial share in this market. Several factors contribute to England's dominance in the fragrance industry, making it a focal point for both consumers and industry players.

England has a rich history of perfume and fragrance use dating back centuries. The country has long been associated with luxury and sophistication, making it a natural breeding ground for the fragrance market. Over time, England has become renowned for its perfume houses and historical contributions to the art of perfumery.

London, the capital of England, is a global fashion and cultural hub. The city's influence on fashion, trends, and style extends to the fragrance market. London's cosmopolitan and diverse population sets the stage for a wide range of fragrance preferences, from classic scents to avant-garde creations. This diversity and trendsetting environment make England a crucial driver in shaping the fragrance market's trends and tastes.

The affluence of consumers in England plays a pivotal role in shaping the country's significant share in the fragrance market. With higher disposable incomes, English consumers are more inclined to invest in premium and luxury fragrances. They have a strong appreciation for fine scents and are willing to explore a variety of fragrance options, ranging from iconic designer perfumes to niche and artisanal creations.

England is home to a multitude of global and local perfume houses that have made their mark in the fragrance industry. Iconic British brands such as Jo Malone, Penhaligon's, and Floris London have achieved international recognition. These brands combine traditional craftsmanship with modern innovation, offering a wide range of fragrances that cater to diverse consumer preferences.

Tourism plays a significant role in England's fragrance market. As a popular tourist destination, visitors from around the world are drawn to the country's historical sites, culture, and fashion. Fragrance brands often create scents inspired by England's heritage, attracting tourists seeking unique souvenirs. This intersection of tourism and fragrance creates an additional revenue stream for the market.

English perfume houses are known for their innovation in perfumery, often experimenting with unique and unexpected fragrance notes. In recent years, there has also been a growing emphasis on sustainability and eco-conscious practices within the industry. Many English fragrance brands have embraced sustainability by using eco-friendly packaging, responsibly sourced ingredients, and cruelty-free practices, aligning with evolving consumer values.

The growth of e-commerce and the online retail landscape has expanded the reach of England's fragrance market. Consumers have easy access to a wide selection of fragrances through online channels. English fragrance brands have adapted to this shift by enhancing their online presence, providing detailed product descriptions, and offering a convenient shopping experience.

Key Market Players

CHANEL

Coty Inc.

Estee Lauder Cosmetics Limited

Jo Malone Limited

Christian Dior UK Limited

L'OREAL (UK) LIMITED

Louis Vuitton UK Ltd.

J. Choo Limited

PACO RABANNE SAS

Shiseido Company Limited

Report Scope:

In this report, the United Kingdom Fragrance market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

United Kingdom Fragrance Market, By Product Type:

Deodorants

Perfumes

United Kingdom Fragrance Market, By Consumer Group:

Male

Female

Unisex

United Kingdom Fragrance Market, By Price:

Luxury

Mass

United Kingdom Fragrance Market, By Sales Channel:

Supermarkets/ Hypermarkets

Exclusive Stores

Online

Others

United Kingdom Fragrance Market, By Region:

England

Scotland

Wales

Northern Ireland

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United Kingdom fragrance Market.

Available Customizations:

United Kingdom Fragrance market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. VOICE OF CUSTOMER

- 4.1. Factors Influencing Purchase Decision
- 4.2. Challenges Faced Post Purchase
- 4.3. Brand Awareness

5. UNITED KINGDOM FRAGRANCE MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product Type Market Share Analysis (Deodorants and Perfumes)

- 5.2.2. By Consumer Group Market Share Analysis (Male, Female, Unisex)
- 5.2.3. By Price Market Share Analysis (Luxury & Mass)
- 5.2.4. By Sales Channel Market Share Analysis (Supermarkets/Hypermarkets, Exclusive Stores, Online and Others)
- 5.2.5. By Regional Market Share Analysis
 - 5.2.5.1. England Market Share Analysis
 - 5.2.5.2. Scotland Market Share Analysis
 - 5.2.5.3. Wales Market Share Analysis
 - 5.2.5.4. Northern Ireland Market Share Analysis
- 5.2.6. By Top 5 Companies Market Share Analysis, Others (2023)
- 5.3. United Kingdom Fragrance Market Mapping & Opportunity Assessment
 - 5.3.1. By Product Type Market Mapping & Opportunity Assessment
 - 5.3.2. By Consumer Group Market Mapping & Opportunity Assessment
 - 5.3.3. By Price Market Mapping & Opportunity Assessment
 - 5.3.4. By Sales Channel Market Mapping & Opportunity Assessment
 - 5.3.5. By Regional Market Mapping & Opportunity Assessment

6. UNITED KINGDOM DEODORANTS MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Consumer Group Market Share Analysis
 - 6.2.2. By Price Market Share Analysis
 - 6.2.3. By Sales Channel Market Share Analysis
 - 6.2.4. By Region Market Share Analysis

7. UNITED KINGDOM PERFUMES MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Consumer Group Market Share Analysis
 - 7.2.2. By Price Market Share Analysis
 - 7.2.3. By Sales Channel Market Share Analysis
 - 7.2.4. By Region Market Share Analysis

8. MARKET DYNAMICS

8.1. Drivers

8.2. Challenges

9. IMPACT OF COVID-19 ON UNITED KINGDOM FRAGRANCE MARKET

9.1. Impact Assessment Model

9.1.1. Key Segments Impacted

9.1.2. Key Regions Impacted

10. MARKET TRENDS & DEVELOPMENTS

11. PORTER'S FIVE FORCES MODEL

11.1. Competitive Rivalry

11.2. Bargaining Power of Buyers

11.3. Bargaining Power of Suppliers

11.4. Threat of New Entrants

11.5. Threat of Substitutes

12. SWOT ANALYSIS

12.1. Strengths

12.2. Weaknesses

12.3. Opportunities

12.4. Threats

13. POLICY AND REGULATORY LANDSCAPE

14. UNITED KINGDOM ECONOMIC PROFILE

15. COMPETITIVE LANDSCAPE

15.1. Company Profiles

15.1.1. CHANEL

15.1.1.1. Company Details

15.1.1.2. Product & Services

15.1.1.3. Financials (As Per Availability)

15.1.1.4. Key market Focus & Geographical Presence

15.1.1.5. Recent Developments

- 15.1.1.6. Key Management Personnel
- 15.1.2. Coty Inc.
 - 15.1.2.1. Company Details
 - 15.1.2.2. Product & Services
 - 15.1.2.3. Financials (As Per Availability)
 - 15.1.2.4. Key market Focus & Geographical Presence
 - 15.1.2.5. Recent Developments
 - 15.1.2.6. Key Management Personnel
- 15.1.3. Estee Lauder Cosmetics Limited
 - 15.1.3.1. Company Details
 - 15.1.3.2. Product & Services
 - 15.1.3.3. Financials (As Per Availability)
 - 15.1.3.4. Key market Focus & Geographical Presence
 - 15.1.3.5. Recent Developments
 - 15.1.3.6. Key Management Personnel
- 15.1.4. Jo Malone Limited
 - 15.1.4.1. Company Details
 - 15.1.4.2. Product & Services
 - 15.1.4.3. Financials (As Per Availability)
 - 15.1.4.4. Key market Focus & Geographical Presence
 - 15.1.4.5. Recent Developments
 - 15.1.4.6. Key Management Personnel
- 15.1.5. Christian Dior UK Limited
 - 15.1.5.1. Company Details
 - 15.1.5.2. Product & Services
 - 15.1.5.3. Financials (As Per Availability)
 - 15.1.5.4. Key market Focus & Geographical Presence
 - 15.1.5.5. Recent Developments
 - 15.1.5.6. Key Management Personnel
- 15.1.6. L'OREAL (UK) LIMITED
 - 15.1.6.1. Company Details
 - 15.1.6.2. Product & Services
 - 15.1.6.3. Financials (As Per Availability)
 - 15.1.6.4. Key market Focus & Geographical Presence
 - 15.1.6.5. Recent Developments
 - 15.1.6.6. Key Management Personnel
- 15.1.7. Louis Vuitton UK Ltd.
 - 15.1.7.1. Company Details
 - 15.1.7.2. Product & Services

- 15.1.7.3. Financials (As Per Availability)
- 15.1.7.4. Key market Focus & Geographical Presence
- 15.1.7.5. Recent Developments
- 15.1.7.6. Key Management Personnel
- 15.1.8. J. Choo Limited
 - 15.1.8.1. Company Details
 - 15.1.8.2. Product & Services
 - 15.1.8.3. Financials (As Per Availability)
 - 15.1.8.4. Key market Focus & Geographical Presence
 - 15.1.8.5. Recent Developments
 - 15.1.8.6. Key Management Personnel
- 15.1.9. PACO RABANNE SAS
 - 15.1.9.1. Company Details
 - 15.1.9.2. Product & Services
 - 15.1.9.3. Financials (As Per Availability)
 - 15.1.9.4. Key market Focus & Geographical Presence
 - 15.1.9.5. Recent Developments
 - 15.1.9.6. Key Management Personnel
- 15.1.10. Shiseido Company Limited
 - 15.1.10.1. Company Details
 - 15.1.10.2. Product & Services
 - 15.1.10.3. Financials (As Per Availability)
 - 15.1.10.4. Key market Focus & Geographical Presence
 - 15.1.10.5. Recent Developments
 - 15.1.10.6. Key Management Personnel

16. STRATEGIC RECOMMENDATIONS

- 16.1. Key Focus Areas
- 16.2. Target Product Type
- 16.3. Target Sales Channel

17. ABOUT US & DISCLAIMER

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Product name: United Kingdom Fragrance Market Segmented By Product Type (Deodorants and Perfumes), By Consumer Group (Male, Female, Unisex), By Price (Luxury & Mass), By Sales Channel (Supermarkets/Hypermarkets, Exclusive Stores, Online, and Others), By Region, Competition, Forecast and Opportunities, 2019-2029F

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