

# Fragrances in Western Europe

September 2020

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## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Western Europe remains largest market, despite the slowest growth

Temporary dip versus brighter future

Germany is the largest, but one of the least dynamic

Premium still has the power

Largest markets with negative results shape the dynamic

Sluggish results due to price pressure and maturity

Diverse distribution across countries

E-commerce is growing across the board

## LEADING COMPANIES AND BRANDS

Multinational players dominate fragrances

Leaders remain unchanged

Consolidation continues...

... close competition between international brands

## FORECAST PROJECTIONS

COVID-19 brings disruptions

Amid slump due to COVID-19 there is potential for personalised products

Soft drivers a key narrative in forecasts...

... but socioeconomic trends are also important

## COUNTRY SNAPSHOTS

Austria: Market context

Austria: Competitive and retail landscape

Belgium: Market context

Belgium: Competitive and retail landscape

Denmark: Market context

Denmark: Competitive and retail landscape

Finland: Market context

Finland: Competitive and retail landscape

France: Market context

France: Competitive and retail landscape

Germany: Market context

Germany: Competitive and retail landscape

Greece: Market context

Greece: Competitive and retail landscape

Ireland: Market context

Ireland: Competitive and retail landscape

Italy: Market context

Italy: Competitive and retail landscape

Netherlands: Market context

Netherlands: Competitive and retail landscape

Norway: Market context

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Portugal: Market context

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Spain: Competitive and retail landscape

Sweden: Market context

Sweden: Competitive and retail landscape

Switzerland: Market context

Switzerland: Competitive and retail landscape

Turkey: Market context

Turkey: Competitive and retail landscape

UK: Market context

UK: Market context

## APPENDIX: INDUSTRY FORECAST MODEL

Growth decomposition explained

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