

Fragrances in Western Europe

September 2020

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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

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Sweden: Competitive and retail landscape

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Switzerland: Competitive and retail landscape

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Turkey: Competitive and retail landscape

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UK: Market context

APPENDIX: INDUSTRY FORECAST MODEL

Growth decomposition explained

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