

# Retail Week Market Feature Notes

Premium Skin Care, Premium Cosmetics, Fine Fragrance & Gifting Markets

Analyst: Tim Nancholas

Source: TNS WorldPanel

Data: 52 week ending 09 Dec 2007 vs 2006

**Expenditure**

**£1.45 bn**

**+14%**

**No. of Units**

**65.2 m**

**+14%**

**Average  
Selling Price**

**£22.21**

**n/c%**

## Retail Sector Share ££%

	52 w/e 10 Dec 2006	52 w/e 09 Dec 2007
Total Chemists	30.9	31.5
Boots	28.3	28.8
Total Department Stores	37.6	35
Total Duty Free	4.9	5.7
Total Mail Order	0.8	0.9
Total Multiple Grocers	1.6	1.2
Cosmetic outlets	5.5	4.9
Perfume outlets	9.3	8.8

## Premium Skin Care, Prem Cosmetics, Fine Fragrance & Gifting

- 14% overall market growth since last year driven by people purchasing greater volumes but average prices overall static
- Multiple Grocers struggle to make any impact
- Boots continues to perform well.
- Total Department stores have lost share in the market with Duty Free gaining.
- Internet sales are well up year on year but Perfume outlets hit by other High Street competitors

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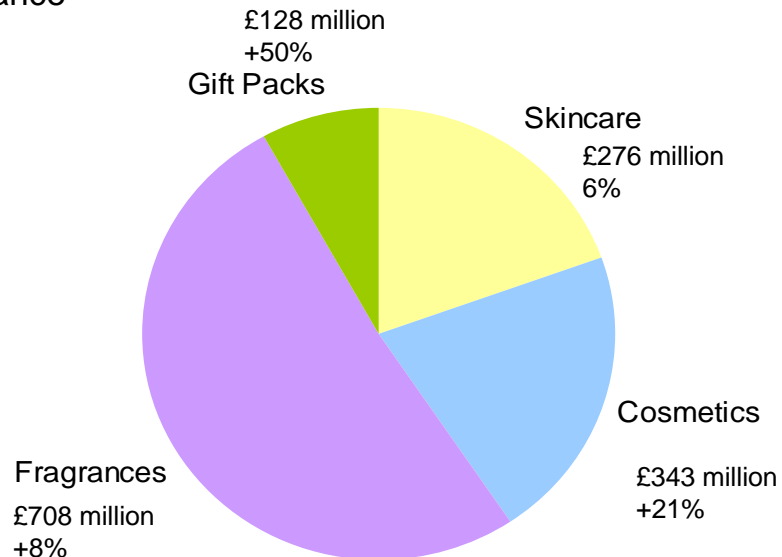
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## Product Trends

### Gifts

**Winners:** Cosmetic gift packs

**Losers:** Female Fine Fragrance



## Product Trends

### Premium Skincare

**Winners:** Moisturisers – anti-ageing

**Losers:** Cleansing

## Product Trends

### Fine Fragrances

**Winners:** Male Fine

**Losers:** Unisex Fine in growth but not as strongly as male/female.

## Product Trends

### Premium Cosmetics

**Winners:** Face, growing well but not as strongly as Other sectors

**Losers:** Nails – very strong performance