

# Retail Week Market Feature Notes

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

Analyst: Tim Nancholas

Source: TNS WorldPanel Beauty

Data: 52 week ending 06 Jan 2008 vs 2007

**Expenditure**

**£1.47 bn**

**+9%**

**No. of Units**

**67.4 m**

**+14%**

**Average  
Selling Price**

**£21.75**

**-4%**

## Retail Sector Share ££%

	52 w/e 07 Jan 2007	52 w/e 06 Jan 2008
Total Chemists	31.2	31.7
Total Department Stores	36.9	34.6
Total Duty Free	5.0	5.3
Total Mail Order	0.7	1.2
Total Multiple Grocers	1.5	1.2
Cosmetic outlets	5.3	4.9
Perfume outlets	9.7	8.0

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

- Overall, the Premium market growth in value of 9% has been achieved by greater volumes, and strong cosmetic sales.
- Whilst the number of Fine Fragrance packs yr on yr sold is constant, prices have, on average, fallen.
- Multiple Grocers fail to make head way in the premium sector though they may view this as a lost opportunity.
- Boots performs better than the market with cosmetics leading the way.
- Total Department stores have lost share in the market but Debenhams had a good Christmas period, as did House of Fraser.
- John Lewis do not perform as well as their non Beauty sales suggest.

# Retail Week Market Feature Notes

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

Analyst: Tim Nancholas

Source: TNS WorldPanel Beauty

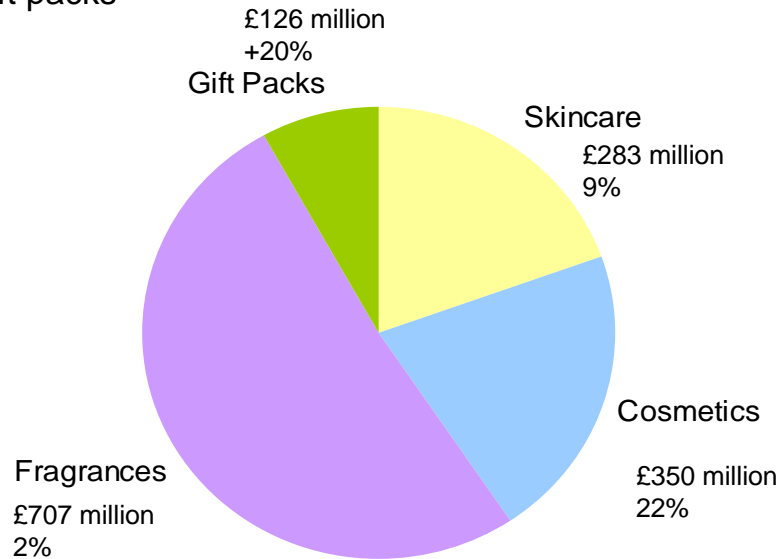
Data: 52 week ending 06 Jan 2008 vs 2007

## Product Trends

### Premium Gifts

**Winners:** Male Fine Fragrance

**Losers:** Colour Cosmetic gift packs and Female Fine Fragrance



## Product Trends

### Premium Skincare

**Winners:** Moisturisers

**Losers:** Cleansing

## Product Trends

### Fine Fragrances

**Winners:** Celebrity up 82%, DKNY, Men's Fine.

**Losers:** Female Fine Fragrance due to prices falling

## Product Trends

### Premium Cosmetics

**Winners:** Palettes, Lip Stick, Nail Varnish

**Losers:** Mass cosmetics growth much less than premium