

The Fragrance Opportunity:

What's Driving Beauty's Fastest-Growing Segment?

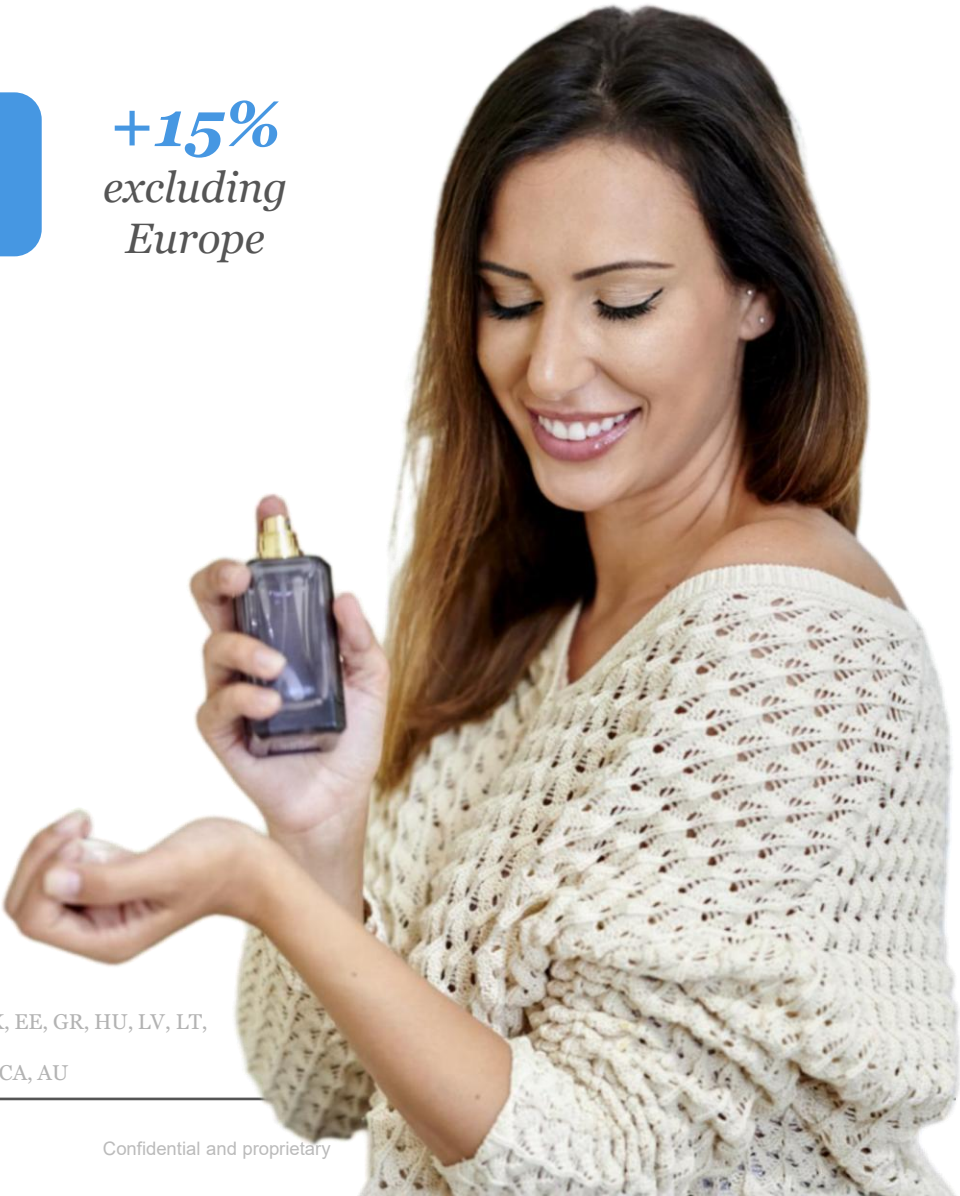
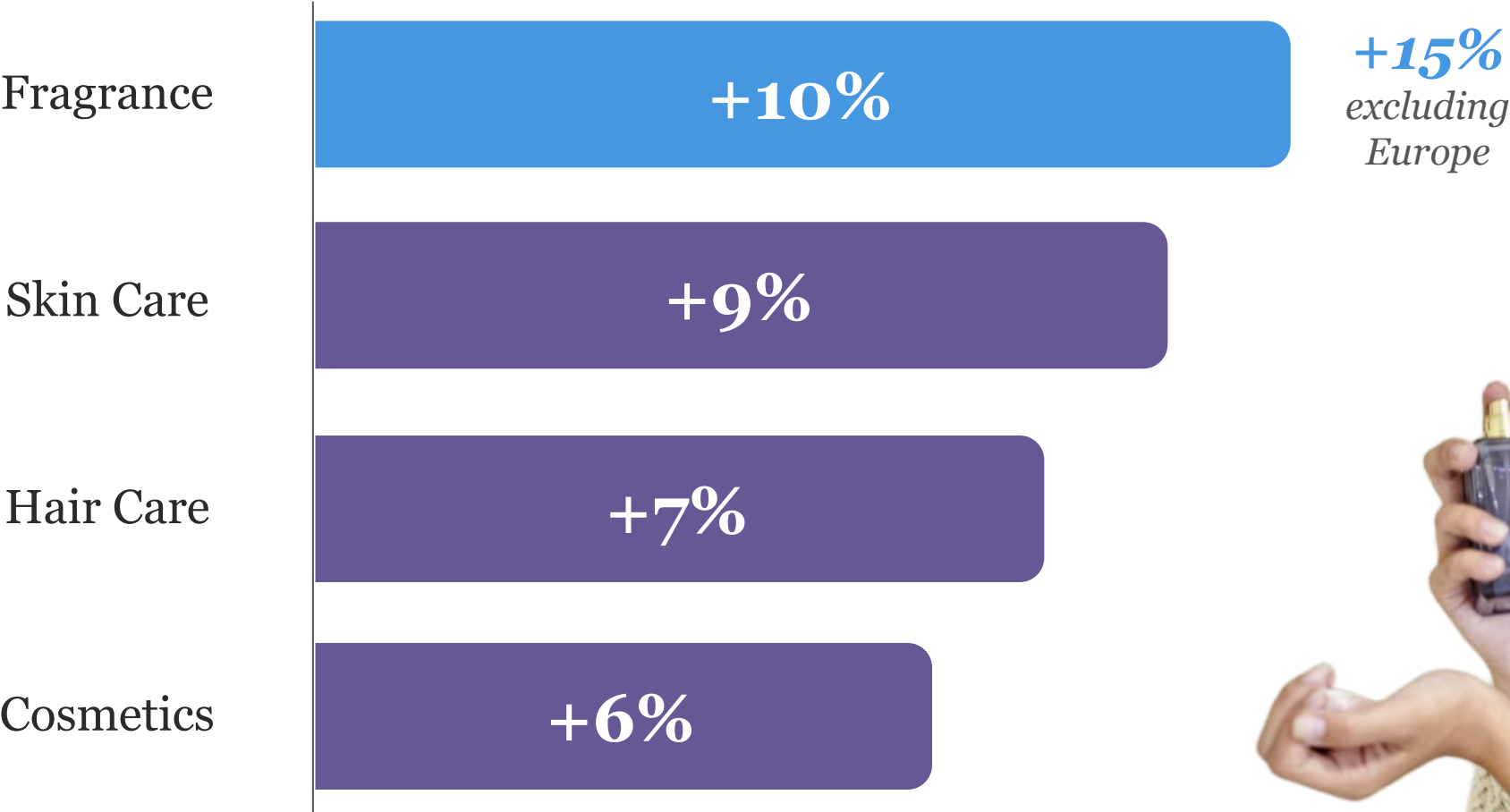
Beauty Category Spotlight

NielsenIQ



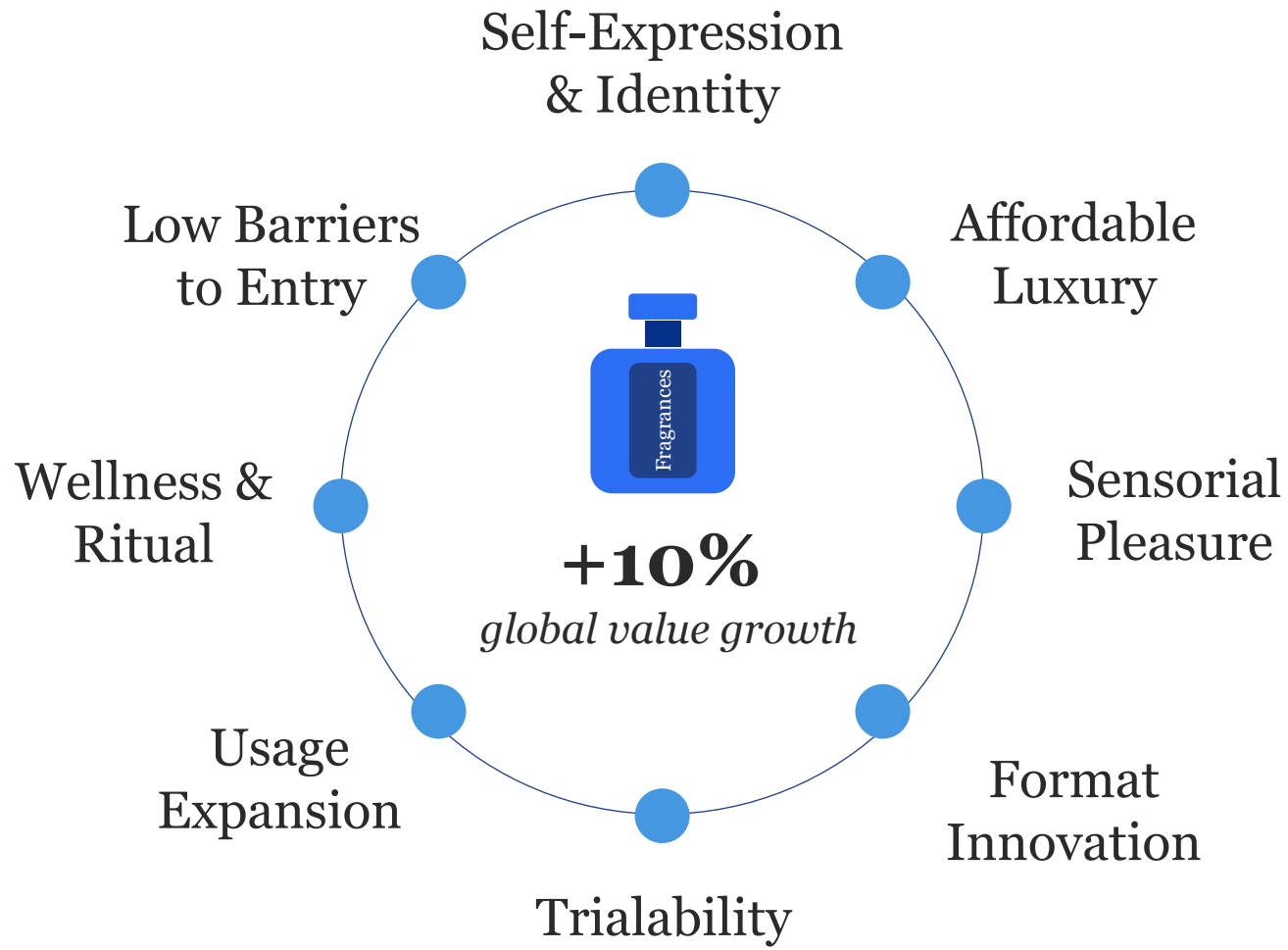
Fragrance in the Spotlight

Value % Change vs YA MAT Q1 2026 - Global



*Fact: Value % growth vs YA (unweighted)
Sourcing: 52 markets - Omnisales (FR, DE, IT, ES, GB, AT, BE, CH, NL), Omnishopper (US, CA, AU), incl TikTok (CN), incl ecom (KR), NIQ QBN BA, HR, DK, EE, GR, HU, LV, LT, NO, PL, PT, RO, SI, SE, UA, AR, BR, DO, EG, HK, IN, ID, KZ, MY, MX, MM, NZ, PE, PH, PR, SA, SG, ZA, TW, TH, TR, AE, VN) *).
Key exclusions: China & South Korea excludes cosmetics & fragrances, UK excludes fragrances. Beauty specialist offline channel only captured in US, ES, CH, CA, AU

Fragrance Interest Is Driven By a Convergence of Factors



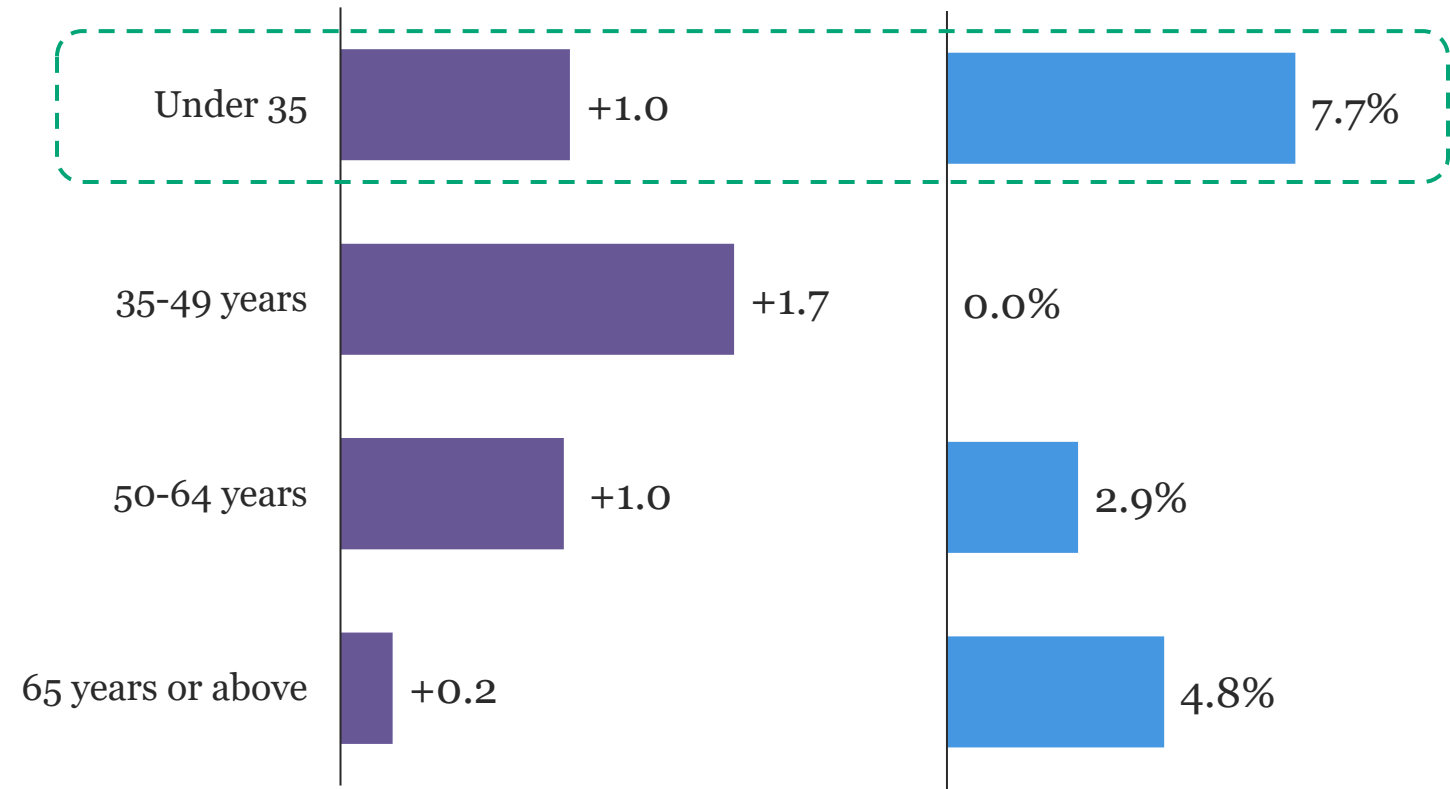
New Entrants: Fragrance's Future Generation

Fragrance - West Europe



Penetration Change vs YA

Volume % Change vs YA



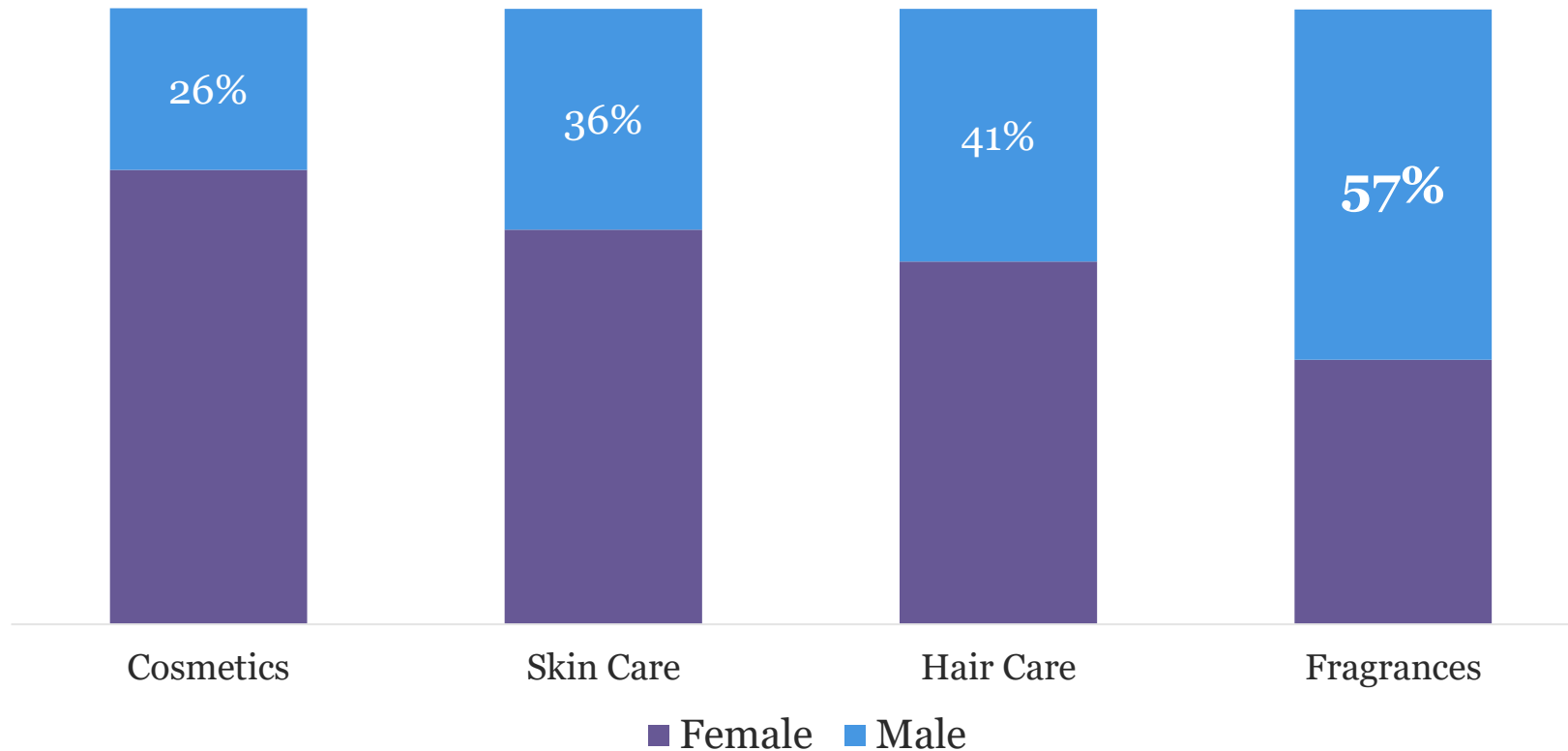
Source: NielsenIQ Consumer Panel EU – GB, FR, DE, ES, IT, PT, CH – Latest 52 weeks vs YA May 2026



Male Motivations: Men Contribute More to Fragrance Spend



Value by Gender – Beauty Categories – Ecommerce, Germany



Male fragrance buyers spent an average of **€107** online on fragrances in the past 12 months

106 index vs female buyers



Source: NielsenIQ Digital Purchases Latest 52 weeks ending 17th May 2026 - Germany

Global Appeal: Arabian Fragrance Brands Enter the Mainstream



Value % Change vs YA - Global

+230% vs 2YA

+44% vs YA



“Established in the UAE, Lattafa’s vision extends beyond borders. We currently reach fragrance enthusiasts in over 120 countries”

+88% vs 2YA

+49% vs YA



“Armaf has established itself as one of the leading perfume brands in the UAE., and the future looks bright for Sterling Perfumes”

+53% vs 2YA

+110% vs YA



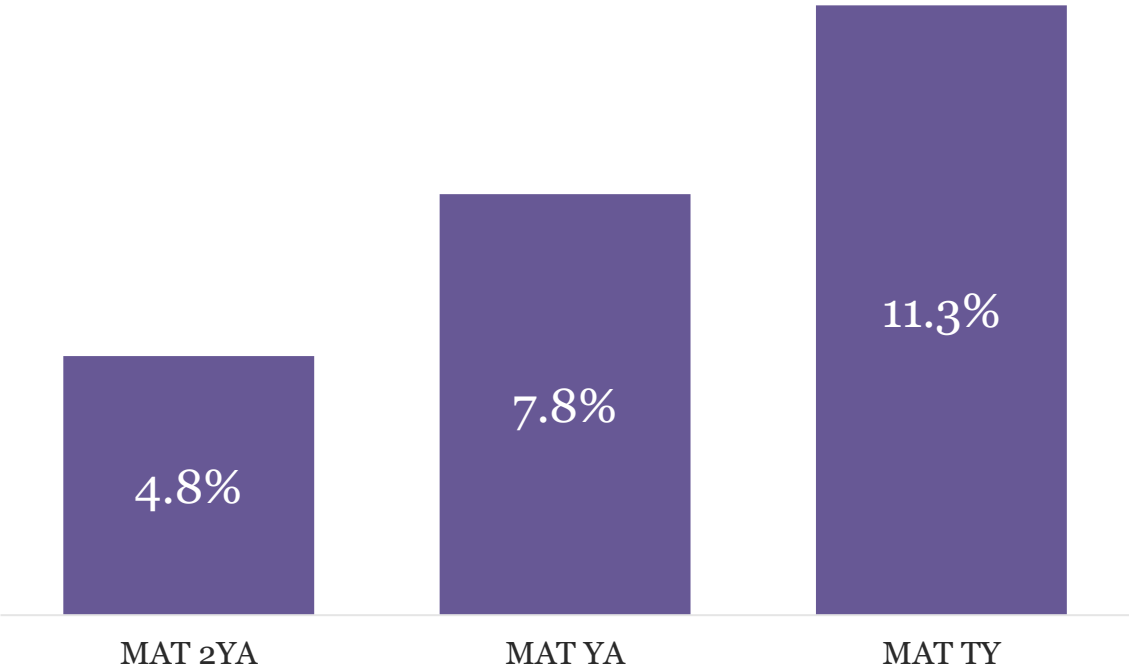
“Rasasi is considered UAE’s leading fragrance brand and a brand of consumer choice across the globe especially known for its quality.”

Source: NielsenIQ Omnishopper Panel, Omnisales & Retailer Measurement Data – Latest 52 weeks ending Feb 2026 | <https://lattafa.com/about-us/> | [About Us – Rasasi](#) | [ABOUT US](#)

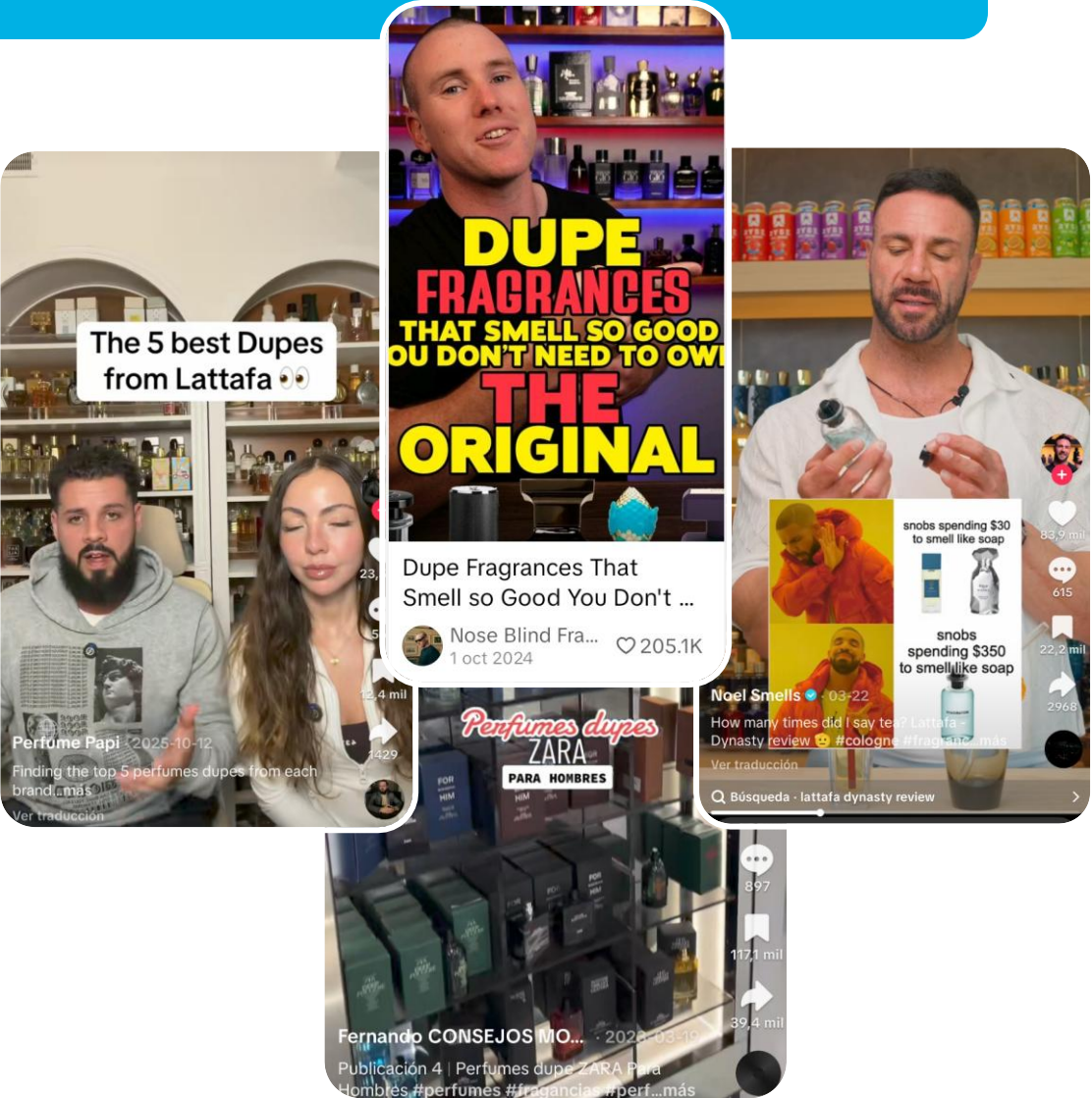
Dupe Domination: The Affordable Alternatives Driving Demand

Fragrance Dupe: A product hailed as a ‘duplicate’ or more affordable alternative to a high-end product

‘Dupe’ Brands Share of Fragrance Value Sales
UK Ecommerce 

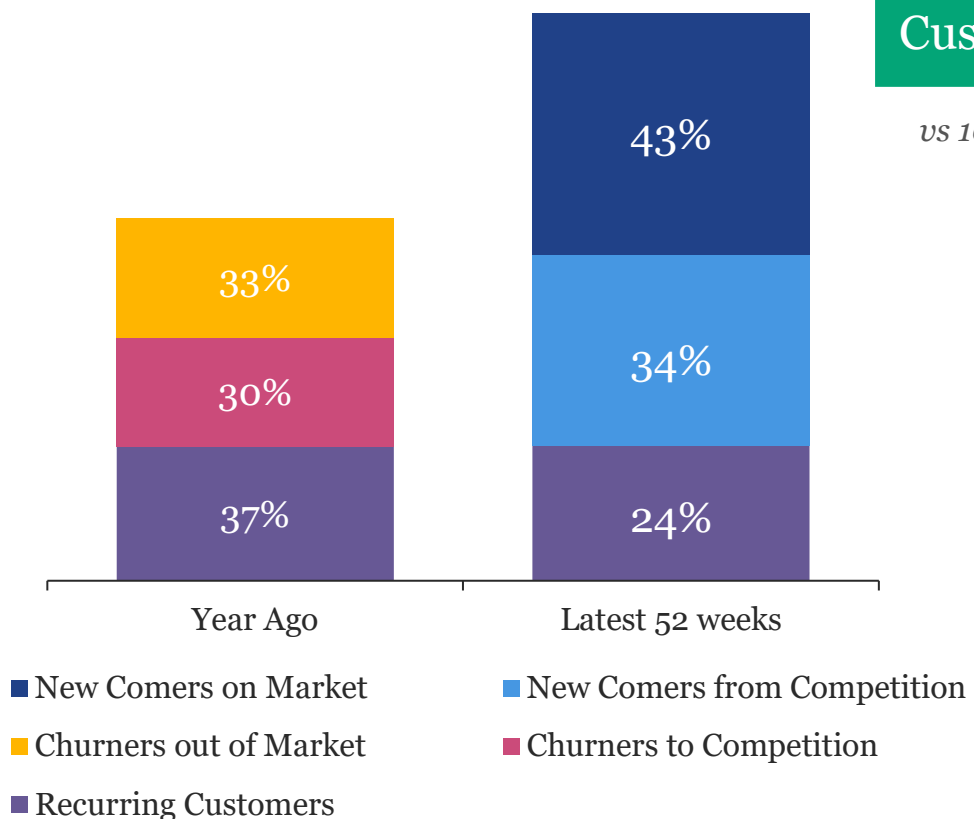


Sources: NielsenIQ Digital Purchases UK Latest 52 weeks ending 17th May 2026 – Custom list of ‘dupe’ brands based on marketing and customer perception| images sourced from TikTok



Dupe Expansion: Dupe Brands Can Bring New Trial & Increased Spending

Dupe Fragrance Brands – Online Customer Base Evolution - UK



Customer base grew by 55%

vs 10% customer base growth for total fragrance category

Dupe buyers **spent 65% more** on fragrances than the average online category buyer



Source: NielsenIQ Digital Purchases United Kingdom Latest 52 weeks 17th May 2026

Emerging Formats and Innovations Evolving the Category

Sticks



Sol de Janeiro Perfume Balm - Solid Perfume

Refillable & Refills



Prada Paradoxe - Refillable Eau de Parfum

Solids



Solid Scent Co. Refillable Fragrance

Sources: images sourced from brand websites | NielsenIQ Omnishopper Panel NPI – Latest 52 weeks April 2026

Gourmand Scents Drive a Mood Boosting Relief for Daily Rituals

Fragrance - Value % Change vs YA



+36%



Contains **Berries**
Qualified



+64%



Contains **Citrus**
Qualified



+114%



Contains **Honey**
Qualified



+89%



Contains **Coconut**
Qualified



+143%



Contains **Vanilla**
Qualified

Source: NielsenIQ Product Insight, Total US xAOC, Latest 52 Weeks 18th April 2026, Syndicated Hierarchy | CA – NDH – Latest 52 weeks 9th May 2026 | DE Omnisaales Latest 52 weeks 26th April 2026

Why Fragrance is Booming

1. In a pressured economy, **small luxuries**, made increasingly accessible by dupes, are sought out by consumers to provide indulgence and a sense of mood-boosting routine and self-expression.
2. Reaching **new consumer groups**, especially with the youngest consumers and men, as well as growing interest in countries where fragrances are not as deeply penetrated in beauty routines.
3. From trending gourmand scents to new formats like solids and refillables, continuous **product innovation** keeps the category fresh, amplified by growing social media communities that turn fragrance into a passion.

Let us know your feedback!



How the score is calculated:

0 1 2 3 4 5 6	7 8	9 10
Not Satisfied	Neutral	Satisfied