Fragrances

November 2011

LIST OF CONTENTS AND TABLES

FRAGRANCES IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

HEADLINES

- Current value sales of fragrances increase by 8% in 2010 to reach AED756 million
- Although growth is lower than it was in the historic period, fragrances prove remarkably resilient to economic slowdown
- In spite of the slowdown, premium fragrances continue to grow at the same rate as mass fragrances
- Unit prices remain stable as manufacturers respond to price-sensitive nature of the overall market
- Fragrances remains largely fragmented amidst continuous key launches
- Fragrances is expected to post a constant value CAGR of 5% over the forecast period

TRENDS

- Fragrances grew by 8% in current value terms in 2010 as sales reached AED756 million. Growth was slightly lower than the 9% growth of 2009 due to slightly lower consumer spending and declining tourist arrivals.
- Nevertheless, the United Arab Emirates continued posting one of the highest per capita expenditures on fragrances with AED160 in 2010, thanks to low taxation, wide product availability and coupled with high consumption rates amongst both the local and expatriate populations. Emiratis, whether local or foreign, love their fragrances.
- Despite the economic slowdown premium and mass fragrances recorded similar growth, reflecting very little trading down to cheaper brands during 2010. In addition to benefiting from strong advertising budgets, premium fragrances rely on the lack of product substitution. Premium fragrances are mostly consumed by high-income earners who are highly unl kely to trade down to mass fragrances.
- Fragrances are purchased across all demographics in the United Arab Emirates, but with variations depending on the socioeconomic group. One common element is the trend towards strong fragrances, regardless of whether mass or premium. Also, the global trend towards attaching celebrity names to fragrances works less well in the Emirates due to the diverse population – many celebrities are simply not known by Western, Emirati and Asian parts of the population.
- Fragrances are essential to the local population; they are part of the basic attire and consumed throughout the day and during any occasion or outing. Local nationals mainly consume Oriental fragrances like oudh and sandalwood, which are also popular amongst GCC nationals flocking to the United Arab Emirates. As for other populations, fragrances are also popular amongst Arab expatriates, where middle- to high-income earners usually purchase premium brands, whilst lower socioeconomic groups demand mass brands.
- The United Arab Emirates sees demand for Oriental fragrances, which are a major part of the local culture. These fragrances are sold through specialist perfumeries, actually large local

chains like Ajmal and Rasasi, to name a few of the various manufacturers and retailers of Oriental fragrances.

- Unit prices barely registered any increase during 2010 as manufacturers responded to price sensitivity and avoided harming sales in what is one of the most robust beauty and personal care categories in the UAE.
- Fragrances in the United Arab Emirates are mostly premium – premium fragrances accounted for 73% of total value sales of fragrances in 2010. Premium fragrances are mainly available through department stores and beauty specialist retailers. Beauty specialist retailers accounted for 42% of sales and department stores 19%. Although there are no rankings for premium brands, major department stores – like Debenhams and Harvey Nichols – and beauty specialist retailers – like Paris Gallery and Faces – regularly post a weekly ranking of the 10 best-selling fragrances for men and women. The list is posted on a separate stand along with a tester for each brand of the respective top 10 fragrances.
- The sophistication of premium fragrance products and retailers continues to increase to the extent that specialist perfumeries like Penhaligon’s and L’Occitane are well represented throughout the United Arab Emirates. In addition, limited edition extensions to existing popular brands are quickly launched in the United Arab Emirates.

COMPETITIVE LANDSCAPE

- Fragrances remained largely fragmented amidst continuous launches, with fragrances leader L'Oréal Middle East holding a retail value share of only 6% in 2010, up half a percentage point on 2009. Emporio Armani continued to be the best-selling premium brand for both men and women with over 5% of value sales of premium fragrances overall.

PROSPECTS

- Competition between local producers and international players is expected to intensify. Retail space could play a significant role in the new landscape as availability and presence will be relevant to the purchasing of fragrances throughout the country. Arabian producers are collectivising under the Fragrance Foundation to promote local products and secure their position in the domestic market. All players are expected to continue to expand rapidly and marketing budgets will increase in order to provide support to new products launched onto the marketplace.

CATEGORY DATA

Table 1 Sales of Fragrances by Category: Value 2005-2010

AED million

	2005	2006	2007	2008	2009	2010
Premium Fragrances						
- Premium Men's Fragrances						
- Premium Women's Fragrances						
- Premium Unisex Fragrances						
Mass Fragrances						
- Mass Men's Fragrances						
- Mass Women's Fragrances						
- Mass Unisex Fragrances						
Fragrances						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Fragrances by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 Total
Premium Fragrances			
- Premium Men's Fragrances			
- Premium Women's Fragrances			
- Premium Unisex Fragrances			
Mass Fragrances			
- Mass Men's Fragrances			
- Mass Women's Fragrances			
- Mass Unisex Fragrances			
Fragrances			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Fragrances Company Shares 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research,
store checks, trade interviews, trade sources

Table 4 Fragrances Brand Shares by GBN 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research,
store checks, trade interviews, trade sources

Forecast Sales of Fragrances by Category: Value 2010-2015

AED million

	2010	2011	2012	2013	2014	2015
Premium Fragrances						
- Premium Men's Fragrances						
- Premium Women's Fragrances						
- Premium Unisex Fragrances						
Mass Fragrances						
- Mass Men's Fragrances						
- Mass Women's Fragrances						
- Mass Unisex Fragrances						
Fragrances						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 6 Forecast Sales of Fragrances by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Premium Fragrances		
- Premium Men's Fragrances		
- Premium Women's Fragrances		
- Premium Unisex Fragrances		
Mass Fragrances		
- Mass Men's Fragrances		
- Mass Women's Fragrances		
- Mass Unisex Fragrances		
Fragrances		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

FRAGRANCES IN THE UNITED ARAB EMIRATES - COMPANY PROFILES

AJMAL INTERNATIONAL TRADING CO LLC IN BEAUTY AND PERSONAL CARE (UNITED ARAB EMIRATES)

Strategic Direction

~ Following its well-established presence in the United Arab Emirates and GCC markets, Ajmal is looking forward to expanding its reach regionally to Asia and Europe.

Key Facts

Summary 1 Ajmal International Trading Co LLC: Key Facts

Full name of company:	Ajmal International Trading Co LLC
Address:	Hamarain Centre, Gate 8, 2nd Floor, PO Box 8809, Dubai, United Arab Emirates
Tel	+971 (4) 269 0102
Fax:	+971 (4) 2629747
www:	www.ajmalperfume.com
Activities:	Manufacturing and trading of Oriental fragrances

Source: Euromonitor International from company reports, company research, trade press, trade sources

Summary 2 Ajmal International Trading Co LLC: Operational Indicators

	2008	2009	2010
Net sales	AED12.4 million	AED12.1 million	AED13.6 million

Source: Euromonitor International from company reports, company researcn, trade press, trade sources

Company Background

~ With a retail network of 110 outlets across the GCC, 36 of which are in the United Arab Emirates, Ajmal Group has truly established a niche as the United Arab Emirates' leading manufacturer and marketer of Oriental fragrances. The group comprises three entities - Fabson Import Export, which is the purchasing and wholesale trading arm; Ajmal Perfume Manufacturing & Oudh Processing Industry (APM), which handles the manufacturing business; and Ajmal International Trading and Ajmal Perfumes, which handle the retail and showroom business. The Ajmal group is a family-owned entity which commenced business more than 50 years ago in India, whilst the United Arab Emirates operations started in 1978. The group - popularly known as Ajmal - is run by three Indian brothers, each of whom has an almost equal share in the business.

~ The group's history traces back to the 1950s, when founder Ajmal Ali started trading in agarwood and oudh in 1950 and complemented it with a blending facility in 1951, all under the commercial name of Ajmal Perfumes, which was located in Bombay, India. Starting in 1951, Ajmal Perfumes became the leading supplier of Oriental fragrances to the Middle East. In 1976, Ajmal Perfumes moved its operations to Dubai, United Arab Emirates, and opened its first outlet during the year.

~ By the late 1980s, Ajmal reached a number of production milestones, like launching the first eau de perfume made from oudh in 1987, setting up a manufacturing and research and development facility in Dubai, and creating exclusive fragrances for regional airlines like Kuwait Airways, Gulf Air and Saudi Arabian Airlines. From the early 1990s, Ajmal embarked on an expansion spree with the first showroom in Kuwait in 1991, followed by Oman, Qatar, Saudi Arabia and Bahrain. Ajmal's perfumes are now well represented across the Middle East through a network of more than 100 retail outlets and more than 500 dealerships. Products are also available at regional duty-free shops like Dubai and Abu Dhabi, to name a few.

Production

~ In addition to the company's own agarwood plantations in Assam, India, which account for around 40% of the required raw materials, Ajmal sources the balance from the Far East, namely from Singapore, Cambodia, Malaysia and Thailand. Raw materials are sourced from wor1d-renowned suppliers like Symrise, IFF, Firmenich, Givaudan, Drom and V Mane Fils. Similarly, with a view to ensuring that the packaging of its fragrances are in line with international standards, Ajrnal Perfumes sources glass bottles from several internationally renowned manufacturers, such as Brosse, NVM, Heinz Glas and Bormioli.

~ Ajmal Perfume is arguably the industry leader in perfume and oudh manufacturing in the United Arab Emirates. The various perfumery products can be categorised into: Light Orientals; Heavy Orientals; Florientals; Contemporary; Customised and Essential Oils.

~ Some 90% of the company's sales are made through retail outlets and the remaining 10% are exports to India. The company recently expanded its export market and is in the process of finalising contracts with wholesale distr butors in Pakistan and Iran as well. The company plans to increase export sales to reach 20% of total turnover. Ajmal caters to a niche market targeting Arab GCC nationals and is considered a leading name in its line of business. It has been observed that sales have remained brisk, even during the summer and other traditionally slow business months, courtesy of shopping festivals, DSS (Dubai Summer Surprises) and a constant stream of visitors, especially to Dubai.

~ In 2004, Ajmal set up its new manufacturing facility in Dubai's Al Quoz Industrial Area, with an investment cost of US$10 million and a production capacity of 50,000 bottles per day. Erected over a landscape of 150,000 sq ft, the facility houses the manufacturing, packaging and research and development divisions.

~ Ajmal group is the only private sector company that is authorised by the Saudi Arabian government to act as the Certification Agency for complying with the Saudi Arabia Standard Organisation. Thus some of the competitor products also get tested and certified in Ajmal's laboratory prior to dispatch to Saudi Arabia.

Summary 3 AjmalInternational Trading Co LLC: Production Statistics 2010

Location	Brand	Annual production
Al Quoz, Dubai		16 million bottles

Source: EuromonitorIntemationalfrom companyreports, companyresearch,trace press,trade sources,trace interviews

Competitive Positioning

~ Ajmal's main domestic competitors are Rasasi, Designer Shaik, and Al Haramain Perfumes, as well as other smaller players in the market.

~ Ajmal focuses on premium fragrances whilst Al Haramain caters to the mass market; the latter is therefore not a direct competitor. On the other hand, Rasasi does not fully concentrate on Oriental fragrances like Ajmal as it manufactures both Western and Oriental fragrances.

~ Ajmal ranked fifth in fragrances and fourth in premium fragrances in the United Arab Emirates in 2010 with a value share of 2% in each category. Amongst domestic companies Ajmal ranked first. The company accounted for a 0.3% value share of beauty and personal care as a whole, which places it in 28th position overall.

Summary 4 AjmalInternational Trading Co LLC: Competitive Position 2010

Product type	Value share	Rank
Premium men's fragrances	1.7%	5
Premium women's fragrances	1.7%	7
Premium unisex fragrances	23.2%	3

Source: EuromonitorIntemationalfrom companyreports, companyresearcn,trade press, trace sources,trace interviews

BEAUTY AND PERSONAL CARE IN THE UNITED ARAB EMIRATES - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Economy Slow To Recover From Crisis

The economic slowdown that hit the UAE in mid 2008 continues to dampen demand as population growth remains constrained and consumer spending is lower due to the uncertain climate. Nonetheless, all categories are forecasted to grow at higher rate than of the review period in constant terms, reflecting the expected recovery of the economy over the next five years.

New Products and Promotions Stimulate Demand

Manufacturers responded to lower consumer demand by stimulating the market with new products and promotional activities. New products were rife in skin care with anti-aging and antiwrinkle creams leading new launches. Promotions in oral care and in soap helped keep sales buoyant and were led by the major manufacturers keen to keep hold of market share.

Domestic Manufacturers Fall Further Behind International Brands

Domestic manufacturers continued to struggle in most areas of beauty and personal care, with little presence in baby care, bath and shower products, deodorants and oral care. Cosmetics and fragrances fared better, with stronger representation and competitive products from Kamal Osman Jamjoon (cosmetics), Ajmal International and Rasasi Perfumes (both fragrances).

Supermarkets/hypermarkets Remain in Control of Distribution

In addition to being positioned as the domain of weekly shopping, supermarkets/hypermarkets are reinforcing their lead in the distribution of beauty and personal care products. The low consumer confidence has clearly come to benefit these channels, particularly due to their regular promotions and growing interest in their private label beauty and personal care lines.

A Delayed Recovery

Although the global economy had showed signs of recovering by the second half of 2009, the United Arab Emirates has remained mired in recession. The Dubai debt crisis, which erupted in November 2009, has continued to slow economic recovery, and has accordingly fed through into the beauty and personal care industry. Nonetheless, this is expected to be reversed as forecast growth rates are higher than the review period reflecting the expected economic recovery.

MARKET DATA

Table 1 Sales of Beauty and Personal Care by Category: Value 2005-2010

AED million

	2005	2006	2007	2008	2009	2010
Baby Care						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care excl Power Toothbrushes						
Skin Care						
Sun Care						
Sets/Kits						
Premium Cosmetics						
Mass Cosmetics						
Beauty and Personal Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note 1: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.
Note 2: Sum of categories is greater than market size because the four men's toiletries categories are included in men's grooming as well as in bath and shower, deodorants, hair care and skin care.

Table 2 Sales of Beauty and Personal Care by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 Total
Baby Care			
Bath and Shower			
Colour Cosmetics			
Deodorants			
Depilatories			
Fragrances			
Hair Care			
Men's Grooming			
Oral Care			
Oral Care excl Power Toothbrushes			
Skin Care			
Sun Care			
Sets/Kits			
Premium Cosmetics			
Mass Cosmetics			
Beauty and Personal Care			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note 1: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.
Note 2: Sum of categories is greater than market size because the four men's toiletries categories are included in men's grooming as well as in bath and shower, deodorants, hair care and skin care.

Table 3 Sales of Premium Cosmetics by Category: Value 2005-2010

AED million

	2005	2006	2007	2008	2009	2010
Premium Baby Care						
Premium Bath and Shower						
Premium Colour Cosmetics						
Premium Deodorants						
Premium Fragrances						
Premium Hair Care						
Premium Skin Care						
Premium Sun Care						
Premium Sets/Kits						
Premium Cosmetics						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

Table 4 Sales of Premium Cosmetics by Category: % Value Growth 2005-2010

% current value growth

	2009/10	2005-10 CAGR	2005/10 Total
Premium Baby Care			
Premium Bath and Shower			
Premium Colour Cosmetics			
Premium Deodorants			
Premium Fragrances			
Premium Hair Care			
Premium Skin Care			
Premium Sun Care			
Premium Sets/Kits			
Premium Cosmetics			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

Table 5 Beauty and Personal Care Company Shares by NBO 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010

	2006	2007	2008	2009	2010
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research,
store checks, trade interviews, trade sources

Beauty and Personal Care Company Shares by GBO 2006-2010

% retail value rsp

Company	2006	2007	2008	2009	2010

Total		100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Beauty and Personal Care Brand Shares by GBN 2007-2010

% retail value rsp

Brand	Company	2007	2008	2009	2010

Total			100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Beauty and Personal Care by Distr bution Format: % Analysis 2005-2010

% retail value rsp

	2005	2006	2007	2008	2009	2010
Store-Based Retailing						
- Grocery Retailers						
- - Discounters						
- - Small Grocery Retailers						
- - - Convenience Stores						
- - - Forecourt Retailers						
- - - Independent Small Grocers						
- - Supermarkets/ Hypermarkets						
- - Other Grocery Retailers						
- Non-Grocery Retailers						
- - Health and Beauty Retailers						
- - - Beauty Specialist Retailers						
- - - Chemists/Pharmacies						

- - - Parapharmacies/ Drugstores						
- - - Other Health and Beauty Retailers						
- - Mixed Retailers						
- - - Department Stores						
- - - Mass Merchandisers						
- - - Variety Stores						
- - - Warehouse Clubs						
- - Outdoor Markets						
- - Other Non-Grocery Retailers						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- Internet Retailing						
- Vending						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Beauty and Personal Care by Category and by Distribution Format: % Analysis 2010

% retail value rsp

	BC	BS	CC	D	DP	F
Store-Based Retailing						
Grocery Retailers						
Discounters						
Small Grocery Retailers						
Convenience Stores						
Forecourt Retailers						
Independent Small Grocers						
Supermarkets/Hypermarkets						
Other Grocery Retailers						
Non-Grocery Retailers						
Health and Beauty Retailers						
Beauty Specialist Retailers						
Chemists/Pharmacies						
Parapharmacies/Drugstores						
Other Health and Beauty Retailers						
Mixed Retailers						
Department Stores						
Mass Merchandisers						
Variety Stores						
Warehouse Clubs						
Outdoor Markets						
Other Non-Grocery Retailers						
Non-Store Retailing						
Direct Selling						
Homeshopping						
Internet Retailing						
Vending						
Total	100.0	100.0	100.0	100.0	100.0	100.0

	HC	MG	OC	SC	SU	SK
Store-Based Retailing						
Grocery Retailers						
Discounters						
Small Grocery Retailers						
Convenience Stores						
Forecourt Retailers						
Independent Small Grocers						
Supermarkets/Hypermarkets						
Other Grocery Retailers						
Non-Grocery Retailers						
Health and Beauty Retailers						
Beauty Specialist Retailers						
Chemists/Pharmacies						
Parapharmacies/Drugstores						
Other Health and Beauty Retailers						
Mixed Retailers						
Department Stores						
Mass Merchandisers						
Variety Stores						
Warehouse Clubs						
Outdoor Markets						
Other Non-Grocery Retailers						
Non-Store Retailing						
Direct Selling						
Homeshopping						
Internet Retailing						
Vending						
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BC = baby care; BS = bath and shower; CC = colour cosmetics; D = deodorants; DP = depilatories; F = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SC = skin care; SU = sun care; SK = sets/kits

Table 10 Forecast Sales of Beauty and Personal Care by Category: Value 2010-2015

AED million

	2010	2011	2012	2013	2014	2015
Baby Care						
Bath and Shower						
Colour Cosmetics						
Deodorants						
Depilatories						
Fragrances						
Hair Care						
Men's Grooming						
Oral Care						
Oral Care excl Power Toothbrushes						
Skin Care						

Sun Care	
Sets/Kits	
Premium Cosmetics	
Mass Cosmetics	
Beauty and Personal Care	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.
Note 2: Sum of categories is greater than market size because the four men's toiletries categories are included in men's grooming as well as in deodorants, skin care, bath and shower and hair care.

Table 11 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2010-2015

% constant value growth

	2010-15 CAGR	2010/15 TOTAL
Baby Care		
Bath and Shower		
Colour Cosmetics		
Deodorants		
Depilatories		
Fragrances		
Hair Care		
Men's Grooming		
Oral Care		
Oral Care excl Power Toothbrushe		
Skin Care		
Sun Care		
Sets/Kits		
Premium Cosmetics		
Mass Cosmetics		
Beauty and Personal Care		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note 1: Premium cosmetic sales are additionally included within baby care, bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.
Note 2: Sum of categories is greater than market size because the four men's toiletries categories are included in men's grooming as well as in deodorants, skin care, bath and shower and hair care.

Table 12 Forecast Sales of Premium Cosmetics by Category: Value 2010-2015

AED million

	2010	2011	2012	2013	2014	2015
Premium Baby Care						
Premium Bath and Shower						
Premium Colour Cosmetics						
Premium Deodorants						
Premium Fragrances						
Premium Hair Care						
Premium Skin Care						
Premium Sun Care						
Premium Sets/Kits						
Premium Cosmetics						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Premium cosmetic sales are additionally included Within baby care. bath and shower. deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

Table 13 Forecast Sales of Premium Cosmetics by Category: % Value Growth 2010-2015

% constant value growth

Premium 8aby Care
Premium 8ath and Shower
Premium Colour Cosmetics
Premium Deodorants
Premium Fragrances
Premium Hair Care
Premium Skin Care
Premium Sun Care
Premium Sets/Kits
Premium Cosmetics

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Premium cosmetic sales are additionally included Within baby care. bath and shower, deodorants, colour cosmetics, hair care, fragrances, skin care, sun care and sets/kits.

DEFINITIONS

This report analyses the market for 8eauty and Personal Care in the United Arab Emirates. For the purposes of the study, the market has been defined as follows:

~ 8aby care
~ 8ath and shower
~ Colour cosmetics
~ Deodorants
~ Depilatories
~ Fragrances
~ Hair care
~ Men's grooming
~ Oral hygiene
~ Skin care
~ Sun care
~ Sets/kits

Sources

Sources used during research include the following:

Summary 1 Research Sources

Official Sources	Abu Dhabi Chamber of Commerce & Industry
	Ajman Chamber of Commerce & Industry
	Dubai Chamber of Commerce & Industry
	Dubai Statistics Center

	Fujairah Chamber of Commerce & Industry
	Shaqah Chamber of Commerce & Industry
	Umm Al Quwain Chamber of Commerce & Industry
Trade Associations	Al Khaimah Chamber of Commerce, Industry & Agriculture
	Arabian Business
Trade Press	Gulf News
	Khaleej Times
	Noozz
	Red Hot
	Ajmal Perfume
Company Sources	Al Shaya Group
	Alberto-Culver
	Alphamed Group
	Avon Al Hathboor
	Avon Products Inc
	Beiersdorf Middle East
	Colgate-Palmolive
	Coty
	CPO
	Himalaya Drug Co, The
	Johnson & Johnson Middle East FZE Jordan
	AS
	Kamal Osman Jamjoom Est
	L'Oreal Middle East
	MAF Carrefour Hyperrnarl<ets
	MH Alshaya Co
	PZCussons
	Rasasi Perfumes Industry LLC
	Sara Trident Emirates LLC
	The Himalaya Drug Co
	Unilever Arabia FZE
	Unilever Group