# Beauty and Personal Care

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# 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

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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

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| | 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 |
|---|---|---|---|---|---|

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| | | | | | |
|---|---|---|---|---|---|
| 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 6 Beauty and Personal Care Company Shares by GBO 2006-2010

% retail value rsp

| Company | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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| | | | | | |
|---|---|---|---|---|---|
| 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 |
|---|---|---|---|---|---|

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| | | | | | | |
|---|---|---|---|---|---|---|
| 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 Distribution 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 | | | | | | |

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| | | | | | | |
|---|---|---|---|---|---|---|
| - - - 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 |

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| | 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 | | | | | | |

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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

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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 |

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

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# BEAUTY AND PERSONAL CARE 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 2 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) 262 9747 |
| www: | www.ajmalperfume.com |
| Activities: | Manufacturing and trading of Oriental fragrances |

Source: EuromonitorInternationalfrom companyreports, companyresearch,trade press,trade sources

Summary 3 Ajmal International Trading Co LLC: Operational Indicators

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

Source: EuromonitorInternationalfrom companyreports, companyresearch,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 AjmalInternational 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.

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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 world-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, Ajmal Perfumes sources glass bottles from several internationally renowned manufacturers, such as Brosse, NVM, Heinz Glas and BormiolL

~ 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 4 AjmalInternational Trading Co LLC: Production Statistics 2010

| Location | Brand | Annual production |
|---|---|---|

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| | | |
|---|---|---|
| Al Quoz, Dubai | Various brands | 16 million bottles |

Source: Euromonilor International from company reports, company research, trade press, trade sources, trade 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 5 Ajmal International 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: Euromonitor International from company reports, company research, trade press, trade sources, trade interviews

# KAMAL OSMAN JAMJOOM EST IN BEAUTY AND PERSONAL CARE (UNITED ARAB EMIRATES)

## Strategic Direction

~ After launching Mikyajy in 1999, Kamal Osman Jamjoom has been focusing on developing the brand as a regional cosmetics retail concept and thereafter to go global through expansion in other emerging markets and Europe.

## Key Facts

Summary 6 Kamal Osman Jamjoom Est: Key Facts

| | |
|---|---|
| Full name of company: | Kamal Osman Jamjoom Trading Establishment (KOJ) |
| Address: | 4th Floor, Unit 422, Sultan Business Centre, Oud Metha Road, Dubai, United Arab Emirates |
| Tel: | +971 (4) 335 5232 |
| Fax: | +97'1 (4) 3355231 |

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| | |
|---|---|
| www: | www.kojamjoom_com |
| Activities: | Retail of cosmetics, lingerie and children's educational toys |

Source: EuromonitorInternationalfrom companyreports, companyresearch, trade press, trade sources

Summary 7 Kamal Osman Jamjoom Est: Operational Indicators

| | 2008 | 2009 | 20'10 |
|---|---|---|---|
| Net sales | Removed | Removed | Removed |

Source: EuromonitorInternationalfrom companyreports, companyresearch, trade press, trade sources

## Company Background

~ Kamal Osman Jamjoom (KOJ) was established in 1987 in the Kingdom of Saudi Arabia as a sole proprietorship of Sheikh Kamal Osman Jamjoom. KOJ is part of the Kamal Osman Jamjoom Group, a diversified retail conglomerate with operations in Saudi Arabia, the United Arab Emirates, Oman and Qatar. The Group has the following legal entities in the United Arab Emirates: Kamal Osman Jamioorn Tradmo Establishment (Dubai), Early Learninq Centre for

## Production

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## Competitive Positioning

Summary 8 Kamal Osman Jamjoom Est: Competitive Position 2010

| Product type | Value share | Rank |
|---|---|---|
| Mass colour cosmetics | Removed | Removed |

Source: EuromonitorIntemationalfrom companyreports. companyresearch.trade sources. trade interviews

## PARIS GALLERY LLC IN BEAUTY AND PERSONAL CARE (UNITED ARAB EMIRATES)

## strategic Direction

## Key Facts

Summary 9 Paris Gallery LLC: Key Facts

| | |
|---|---|
| Full name of company; | Paris Gallery ILC |
| Address: | Golden Tower,13th-18th Floors; Buhaira Corniche; PO Box 554'19; Sharjah, United Arab Emirates |

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| | |
|---|---|
| Tel: | +97'1 (6) 573 4545 |
| Fax: | +97'1 (6) 574 4777 |
| www: | www.parisgallery.com |
| Retailing channels of operation: | United Arab Emirates: |
| | Abu Dhabi: Abu Dhabi Mall (x2), Khalidiya Centre, Lulu Khalidiya Mall, Marina Mall |
| | Al Ain: Al Ain Mall, Al Ain Rotana Complex, Al Bawadi Mall |
| | Dubai: Al Burjuman Centre, Al Bustan Centre, Al Ghurair Centre, Arabian Centre, Dena City Centre |
| | Ras Al Khaimah: Manar MaliSharjah: Gold Souq A and B, Mega Mall |
| Retailing brands: | Hundreds of world-famous brands in fragrance, skin care, colour cosmetics, men's grooming |

Source: EuromonitorIntemationalfrom companyreports, companyresearch,trade sources

Summary 10 Paris Gallery LLC: Operational Indicators

| | 2008 | 2009 | 2010 |
|---|---|---|---|
| Outlets | Removed | Removed | Removed |
| Selling space (sq m) | Removed | Removed | Removed |
| Number of employees | Removed | Removed | Removed |

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

## Company Background

~ Paris Gallery LLC was incorporated in Dubai in 1995, and is owned by the Al Fahim family. The company is engaged in the trading and retailing of fragrances and colour cosmetics, in addition to other luxury goods like sunglasses, leather goods, accessories, watches and crystal ware. The company is a member firm of Al Fahim Holdings, a privately held business group in the Middle East with core interests in premium lifestyle products. Paris Gallery operates across the Middle East employing more than 3,500 staff in total in 81 stores and 1 million sq m of retail space.

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- [redacted]

## Internet Strategy

- [redacted]

## Private Label

- Paris Group is strictly a luxury retailer and does not offer private label products.

## Competitive Positioning

- [redacted]

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# BABY CARE IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Baby care registers current value growth of 5% to reach AED44 million in 2010
- The year-round sunny weather drives demand for baby sun care, which is up by 5% to AED3 million
- Unit price movements during the year are minimal as growth and inflation slow
- Johnson & Johnson (Middle East) leads baby care with a 28% value share
- Baby care is expected to post a constant value CAGR of 3% over the forecast period

## TRENDS

- Current value sales of baby care grew by 5% in 2010 to AED44 million. Growth was lower than the 8% CAGR experienced during the review period of 2005-2010, reflecting the stagnation in population growth as expatriates left the country, taking families with them. Remaining families adopted cautious spending approaches and traded down to cheaper brands, negatively impacting upon volume and value growth.
- Baby sun care recorded growth of 5% on 2009, baby hair care 5%, baby skin care 5% and baby toiletries 4% – products all deemed essential amongst most consumers. Growth in baby sun care lost some ground on 2009 following a significant number of campaigns that year that were followed to the same extent in 2010. Baby hair care and nappy (diaper) rash treatments were the most dynamic categories in 2010.
- Baby skin care posted a slightly lower growth rate compared to that of 2009 on account of trading down to cheaper brands like Himalaya, which elicits strong customer loyalty amongst the Asian population. Baby skin care also managed to stave off competition from cheaper substitute products like talcum powder, which is not recommended by most paediatricians and pharmacists as a skin care product.
- Baby care products are generally purchased by middle- and high-income earners, albeit with some variations. Baby hair, skin and sun care products are common amongst both, whilst baby toiletries are mostly purchased by high-income households. Historically, baby sun care products were not popular in the United Arab Emirates, but given the growing awareness of the dangers of sunlight, parents are becoming remarkably cautious.
- Speciality baby care brands were traditionally available in chemists/pharmacies, and typically have small sales shares. However, as baby care products started making their way into supermarkets and hypermarkets, brand awareness of these products have gradually increased.
- Unit prices remained stable in 2010 as inflation rate remained low. There was also some pressure from the United Arab Emirates' Ministry of the Economy to prevent price hikes, working with supermarkets to monitor prices and prevent manipulators from maintaining the high prices experienced in 2008.
- Premium baby care brands struggled in 2010 in light of the low consumer spending during the year. Although the United Arab Emirates has been historically known for its high disposable

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incomes and consumer purchasing power, both have been hit by economic hardship. Many middle-income earners have resorted to trading down to cheaper brands like Himalaya in a bid to weather the low consumer confidence. Mothercare, which sells a number of premium baby care products in the United Arab Emirates, reported lower volume growth during the year.

- The majority of products available fall under the shampoo, baby oil and baby lotion categories, which are deemed as the essentials amongst most households. Other products like sun protection, aftersun and conditioner are still niche products for many consumers.

## COMPETITIVE LANDSCAPE

- Johnson & Johnson (Middle East) led baby care with a retail value share of 28% in 2010 as the brand continues to elicit strong customer loyalty in the United Arab Emirates. Historically, expatriates hailing from Europe, the US and Asia have been the ones behind transferring their entrenched loyalty to Johnson's to the United Arab Emirates.

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labl products are becoming popular at certain retailers like Carrefour, Géant, Spinneys and Union Cooperative Society.

## PROSPECTS

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- 
- 
- 
- 
- 

## CATEGORY DATA

Table 1 Sales of Baby Care by Category: Value 2005-2010

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AED '000

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Baby Hair Care | | | | | | |
| Baby Skin Care | | | | | | |
| Baby Sun Care | | | | | | |
| Baby Toiletries | | | | | | |
| Medicated Baby Care | | | | | | |
| Nappy (Diaper) Rash Treatments | | | | | | |
| Baby Care | | | | | | |

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

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

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Baby Hair Care | | | |
| Baby Skin Care | | | |
| Baby Sun Care | | | |
| Baby Toiletries | | | |
| Medicated Baby Care | | | |
| Nappy (Diaper) Rash Treatments | | | |
| Baby Care | | | |

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

Table 3 Baby Care Premium Vs Mass % Analysis 2005-2010

% retail value rsp

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | | | | | | |

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

Table 4 Baby Care Company Shares 2006-2010

% retail value rsp

| Company | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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

Table 5 Baby Care Brand Shares by GBN 2007-2010

% retail value rsp

| Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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

Table 6 Baby Sun Care Brand Shares by GBN 2007-2010

% retail value rsp

| Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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

Table 7 Baby Care Premium Brand Shares by GBN 2007-2010

% retail value rsp

| Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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

Table 8 Forecast Sales of Baby Care by Category: Value 2010-2015

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AED '000

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Baby Hair Care | | | | | | |
| Baby Skin Care | | | | | | |
| Baby Sun Care | | | | | | |
| Baby Toiletries | | | | | | |
| Medicated Baby Care | | | | | | |
| Nappy (Diaper) Rash Treatments | | | | | | |
| Baby Care | | | | | | |

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

Table 9 Forecast Sales of Baby Care by Category: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Baby Hair Care | | |
| Baby Skin Care | | |
| Baby Sun Care | | |
| Baby Toiletries | | |
| Medicated Baby Care | | |
| Nappy (Diaper) Rash Treatments | | |
| Baby Care | | |

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

Table 10 Forecast Baby Care Premium Vs Mass % Analysis 2010-2015

% retail value rsp

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | | | | | | |

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

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# BATH AND SHOWER IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Bath and shower products register current value growth of 8% in 2010 to reach AED421 million
- Body wash/shower gel and liquid soap grow strongly although bar soap remains the dominant category, generating AED250 million in sales
- Value sales of liquid soap, body wash/shower gel and bar soap all increase by between 7% and 8%
- Unit prices remain stable for all categories except intimate wipes
- Unilever Gulf dominates bath and shower with a retail value share of 45%
- Bath and shower is expected to post a constant value CAGR of 5% during the forecast period

## TRENDS

- Despite new product developments bar soap remained the mainstay category within bath and shower in 2010 with 59% of bath and shower retail value sales. The current economic slowdown dampened an earlier shifting and premiumisation to bath foam/gel and liquid soap. With the Asian low- and middle-income expatriates accounting for at least 30% of the United Arab Emirates' population, bar soap remains the typical bath and shower product as other bath and shower products remain out of their price range. At least 50% of this consumer group – which, mathematically, is 15% of the United Arab Emirates' population – comprises labourers hailing from the Indian Subcontinent and East Asia, who work through the heat of the day. The dominance of bar soap was pronounced in 2010 as the current recession dampened trial purchases and upgrading to other bath and shower products.
- Bath and shower products registered current value growth of 8% in 2010 with sales of AED421 million. The growth registered was lower than the review period CAGR of 12% in light of the slower volume growth during the year, stemming from the current economic slowdown and the slower population growth. The lower current value growth rate was impacted by slower growth in other bath and shower products as middle-income earners reinstated their interest in bar soap as the typical bath and shower product.
- Whilst the liquid soap markets continue to grow healthily, although at a slower pace, antibacterial products are growing strongly as brands like Dettol and Palmolive push advertising campaigns in light of health scares such as the H1N1 pandemic. Dettol has led its campaign with the line, "the best protection from germs".
- Unit prices remained relatively stable in 2010 as material costs remained low and the government continued monitoring to control prices of basic goods, fearing accelerated inflation.
- Promotions and multipacks continue driving bar soap sales, where the 6-pack is becoming the most popular as it is usually priced at the price of five individual units. In addition to price,

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demand for this multipack is also influenced by the changing consumer lifestyles towards purchasing the weekly grocery shopping from supermarkets/hypermarkets. The latter was reflected in supermarkets/hypermarkets increasing their distribution share of bath and shower products to 86% in 2010.

- Local nationals, Middle Eastern and Asian expatriates are mostly loyal to well-established brands of bar soap, which include Lux, Palmolive and, to a lesser extent, Camay and Dove. Demand for brands like Lux and Palmolive became entrenched amongst these consumer groups initially in their home countries.
- Products with added benefits are constantly rolled out in the United Arab Emirates, and many have proved successful, such as PZ Cussons Imperial Leather Foam Burst, which was an instant hit without any real marketing. Colgate-Palmolive's Palmolive Aroma Therapy range and Henkel's Fa Shower Cream Yoghurt continue to sell well. The majority of products with added benefits include those with extra moisturising or natural ingredients.
- Bath and shower products remain predominantly mass brands, with such brands accounting for 77% of total sales in 2010. Up to very recently, there was a slow but sure premiumisation trend, as the share of premium brands rose from 22% in 2004 to 25% in 2008 out of total sales of bath and shower products. However, this trend has been reversed in the past two years on the back of poor economic conditions, whereby premium brands lost a percentage point to stand at 24% in 2009 and lost another half a percentage point in 2010.
- Bath and shower products continue to see the opening of a number of boutique shops, but this will significantly impact the category overall. Products from these outlets are usually only bought occasionally as gifts or indulgences instead of for regular consumption.

## COMPETITIVE LANDSCAPE

- Unilever Gulf continued to lead in bath and shower with a retail value share of 45% in 2010; its closest rivals are Reckitt Benckiser Arabia and Colgate-Palmolive, which held shares of 9% and 8%, respectively.
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-
-
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## PROSPECTS

- In spite of product innovation and the novelty of gels, foams and washes, bar soap will remain the most valuable category within bath and shower. The share of bar soap out of total retail value sales will remain constant at a forecast 59% in 2015. Bar soap will remain the typical bath and shower product for low- and middle-income earners. In addition, greater demand for brands efficient in killing germs and viruses like Dettol for example are expected.

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## CATEGORY DATA

Table 1 Sales of Bath and Shower by Category: Value 2005-2010

AED '000

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Bar Soap | | | | | | |
| Bath Additives | | | | | | |
| - Bath Foam/Gel | | | | | | |
| - Bath Oil/Pearls | | | | | | |
| - Bath Salts/Powder | | | | | | |
| - Other Bath Additives | | | | | | |
| Body Wash/Shower Gel | | | | | | |
| Intimate Hygiene | | | | | | |
| - Intimate Washes | | | | | | |
| - Intimate Wipes | | | | | | |
| Liquid Soap | | | | | | |
| Talcum Powder | | | | | | |
| Bath and Shower | | | | | | |

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

Table 2 Sales of Bath and Shower by Category: % Value Growth 2005-2010

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Bar Soap | | | |
| Bath Additives | | | |
| - Bath Foam/Gel | | | |
| - Bath Oil/Pearls | | | |
| - Bath Salts/Powder | | | |
| - Other Bath Additives | | | |
| Body Wash/Shower Gel | | | |
| Intimate Hygiene | | | |
| - Intimate Washes | | | |
| - Intimate Wipes | | | |
| Liquid Soap | | | |
| Talcum Powder | | | |
| Bath and Shower | | | |

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

Table 3 Bath and Shower Premium Vs Mass % Analysis 2005-2010

% retail value rsp

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | | | | | | |

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

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Table 4 Bath and Shower 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 5 Bath and Shower 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 6 Bath and Shower Premium Brand Shares by GBN 2007-2010

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% 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 7 Forecast Sales of Bath and Shower by Category: Value 2010-2015

AED '000

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Bar Soap | | | | | | |
| Bath Additives | | | | | | |
| - Bath Foam/Gel | | | | | | |
| - Bath Oil/Pearls | | | | | | |
| - Bath Salts/Powder | | | | | | |
| - Other Bath Additives | | | | | | |
| Body Wash/Shower Gel | | | | | | |
| Intimate Hygiene | | | | | | |
| - Intimate Washes | | | | | | |
| - Intimate Wipes | | | | | | |
| Liquid Soap | | | | | | |
| Talcum Powder | | | | | | |
| Bath and Shower | | | | | | |

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

Table 8 Forecast Sales of Bath and Shower by Category: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Bar Soap | | |
| Bath Additives | | |
| - Bath Foam/Gel | | |
| - Bath Oil/Pearls | | |
| - Bath Salts/Powder | | |
| - Other Bath Additives | | |
| Body Wash/Shower Gel | | |
| Intimate Hygiene | | |
| - Intimate Washes | | |
| - Intimate Wipes | | |
| Liquid Soap | | |
| Talcum Powder | | |
| Bath and Shower | | |

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

Table 9 Forecast Bath and Shower Premium Vs Mass % Analysis 2010-2015

% retail value rsp

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | | | | | | |

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

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# COLOUR COSMETICS IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Current value sales of colour cosmetics are up by 7% to reach AED428 million in 2010
- Although growth of less than 10% is witnessed in 2010, product and brand loyalty help colour cosmetics weather economic downturn
- Nail products see fastest current value growth of 8% in 2010
- Unit prices remain stable in 2010, with -0.2% being the highest price decrease recorded for a category
- Bourjois leads fragmented colour cosmetics with a 10% retail value share in 2010
- Colour cosmetics is expected to post a constant value CAGR of 5% over the forecast period

## TRENDS

- Sales of colour cosmetics grew by 7% to reach AED428 million in 2010, although this was a lower growth rate compared to the 11% review period CAGR, which mainly reflected lower volumes as well as small-scale trading down to cheaper brands.
- Colour cosmetics continued to benefit from the United Arab Emirates' cosmopolitan community, which translates into varied trends and looks, and hence varied colour cosmetics. Demand from Asian consumers is influenced by Bollywood stars, while local nationals and Middle Eastern expatriates follow the trends adopted by Middle Eastern pop and cinema stars, especially from Egypt and Lebanon. Darker skin tones encourage the use of more colour, whilst the paler-skinned expatriate population demands more subtle tones. In addition, the exposure of the United Arab Emirates' female consumers in general to the various nationalities present fuels demand for a wider and innovative range of colour cosmetics.
- In spite of the negative impact of the recession, demand for colour cosmetics has been driven by the expanding retail landscape, the constant launch of new product developments, the United Arab Emirates' cosmopolitan population and, more importantly, the large young female population in the United Arab Emirates.
- Abu Dhabi again hosted Beauty Vision, the capital's beauty world-like exh bition. More than 100 companies and 1,000 products in the beauty and personal care industry showcased in November 2010. With its neighbour Dubai deeply immersed in the global financial crisis, oil-rich Abu Dubai aims to emerge as the region's new business hub. Beauty Vision has offered its participants three unique experiences entitled Vision Match, Vision Concierge and Vision Lounge.
- Nail products posted fast growth in 2010 with a current sales increase of 8%. Lip products also did well, at 8%, followed by eye make-up and facial make up, at about 7%.
- Lip products benefit from the different nationalities present in the United Arab Emirates, each with different cultural preferences and styles. Within lip liner/pencil, Asian expatriates prefer mass brands Revlon ColorStay and Mikyajy 22K, while European expatriates mostly go for

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premium brands l ke Clinique Quick Liner for Lips. Matt lipsticks grew in popularity and as did darker shades.

- Eye liner/pencil remained a key category within colour cosmetics – with current value growth of 8% in 2010 and 10% of total sales of colour cosmetics in this year. This growth was due to the well-established demand for eye liner/pencil in the United Arab Emirates and a shift from the pencil to the liquid eyeliner, especially amongst high-income earners, in response to current make-up trends.
- Facial make-up products are the most popular in the United Arab Emirates, as they accounted for 33% of total value sales of colour cosmetics in 2010. Facial make-up is commonly used in contrast to eye make-up, lip and nail products. Its popularity is also related to climactic factors as women generally do not prefer wearing eye make-up during the morning; but they would still use facial make-up such as a powder base or liquid foundation and blush.
- The large percentage of low- and middle-income Asian expatriates secures demand for economy and standard brands. In eye make-up, for example, certain brands have succeeded in establishing a presence amongst these consumer groups, namely NYX's Candy Glitter Liner and Mikyajy's Sabaya Glitter Eyes, thanks to their attractive prices of AED30 and AED45, respectively.
- Premium outlets such as Paris Gallery and Areej continue to add stores as new retail space becomes available. Premium cosmetics continues to be a significant product area amongst both resident consumers and tourists as prices remain just slightly above those available in duty-free stores and significantly cheaper than in most Western countries.

## COMPETITIVE LANDSCAPE

- Bourjois led colour cosmetics with a retail value share of 10% in 2010, benefiting from the popularity of Chanel in the premium range and Bourjois in the standard range. The Chanel and Bourjois brands held retail value shares of 6% and 5%, respectively, in 2010, banking on their established customer loyalty and key launches during the year.

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## PROSPECTS

- Colour cosmetics is expected to post a constant value CAGR of 5% over the forecast period. This rate is similar to but higher than the CAGR achieved over the review period, indicating that colour cosmetics in general is fairly resistant to economic pressures, but also that expected economic recovery in 2011 will sustain growth for the forecast period.

## CATEGORY DATA

Table 1 Sales of Colour Cosmetics by Category: Value 2005-2010

AED million

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Eye Make-Up | | | | | | |
| Facial Make-Up | | | | | | |
| Lip Products | | | | | | |
| Nail Products | | | | | | |
| Colour Cosmetics | | | | | | |

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

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

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% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Eye Make-Up | | | |
| Facial Make-Up | | | |
| Lip Products | | | |
| Nail Products | | | |
| Colour Cosmetics | | | |

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

Table 3 Colour Cosmetics Premium Vs Mass % Analysis 2005-2010

% retail value rsp

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | | | | | | |

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

Table 4 Colour Cosmetics 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 5 Colour Cosmetics Brand Shares by GBN 2007-2010

% retail value rsp

| Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| | | | | | |

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| | | | | |
|---|---|---|---|---|
| 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 6 Colour Cosmetics Premium 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 7 Forecast Sales of Colour Cosmetics by Category: Value 2010-2015

AED million

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Eye Make-Up | | | | | | |
| Facial Make-Up | | | | | | |
| Lip Products | | | | | | |
| Nail Products | | | | | | |
| Colour Cosmetics | | | | | | |

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

Table 8 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2010-2015

% constant value growth

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| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Eye Make-Up | | |
| Facial Make-Up | | |
| Lip Products | | |
| Nail Products | | |
| Colour Cosmetics | | |

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

Table 9 Forecast Colour Cosmetics Premium Vs Mass % Analysis 2010-2015

| % retail value rsp | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | | | | | | |

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

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# DEODORANTS IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Current value sales of deodorants increase by 9% to reach AED209 million in 2010
- Deodorant sprays remains the most popular as the recession dampens growth of other product formats
- Deodorant sprays records the fastest growth with a 10% current value sales increase in 2010
- Unit prices barely increase for deodorants in 2010
- Unilever Gulf leads deodorants with a retail value share of 29% in 2010
- Constant value sales of deodorants are expected to grow at a constant value CAGR of 6% during the forecast period

## TRENDS

- In spite of the rising environmental awareness over the use of metal aerosol cans, deodorant sprays – typically cheaper than other forms of deodorants – remained the most popular format in 2010 as the recession took its toll. The aforementioned concern has only made its way into the thinking of high-income earners, who managed to shift to other formats like deodorant sticks and deodorant roll-ons. Most consumers are still unaware of the environmental dangers of metal aerosol cans and the government has done little to address the issue. Deodorant sprays remain the typical product for middle-income earners in light of their relatively lower unit price compared to that of other formats, whilst very low-income earners are less likely to use deodorants at all.
- Deodorants grew by 9% in current value terms as sales reached AED209 million in 2010, a lower growth rate compared to the review period CAGR of 13% as the economic slowdown took its toll on the middle-income bracket in particular and there were fewer new users from lower income brackets. In addition to the lower volume growth during the year amidst expatriates fleeing the country, some middle-income earners traded down to cheaper brands and cut down on trial purchases of premium brands. As for high-income earners, they continued consuming premium and standard brands, with a marked shifting away from deodorant sprays given their environmental awareness.
- Deodorant sprays recorded the fastest growth of 10% in current value terms in 2010 with sales reaching AED128 million. The rising concern about using deodorant sprays and product novelty of deodorant sticks were both offset by the lower consumer spending power, which, in turn, drove demand for deodorant sprays.
- Deodorant roll-ons grew by 6%, well behind the growth of 12% recorded over the 2005-2010 review period. The product is no longer a novelty growing from a low base and the market has begun to mature.
- The hot and humid weather in the United Arab Emirates – which can last for seven or eight months of the year – benefits deodorants. As for low-income earners, the usage of deodorants is generally low. For those who opt to use deodorants, deodorant sprays is the entry category for many. The climate, availability and hygiene have all been factors

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stimulating users to try deodorants for the first time. On the other hand, middle-income earners regularly use deodorant, and amongst those users deodorant sprays is the most popular format.

- The United Arab Emirates' economy went deep into recession in 2009, putting a downward pressure on consumer demand and the inflation rate, which continued into 2010. There was, therefore barely any growth in unit prices despite a global rise in the cost of raw materials.
- Deodorants remain largely mass products as mass brands accounted for 98% of total deodorant value sales in 2009. Premium products are mostly brand extensions to premium fragrances, and they are typically purchased by high-income earners. Demand for premium deodorants is reflected in consumers going for a gift set that includes the fragrance and the deodorant. On the other hand, sales of mass deodorants are more linked to availability, affordability and performance rather than present brand loyalty. As for availability and affordability, deodorants are mainly distributed through supermarkets/hypermarkets, and consumers are usually searching for products on promotional offers. In terms of performance, with consumers exposed to intense heat, humidity and prolonged air conditioning, they focus on the performance and long-lasting effect of the deodorant they buy.
- Although no breakdown into deodorant and antiperspirant is available, a growing demand for antiperspirants was evident amongst both men and women in 2010. Partially, this is due to product availability as many popular brands are becoming available in antiperspirant format like Gillette and Mennen Speed Stick for men, and Nivea and Dove for women.
- Trends in body sprays remained limited to new scents as opposed to any further innovation in terms of packaging, ease of use or added-value ingredients.

## COMPETITIVE LANDSCAPE

- Unilever Gulf remained the leader in deodorants with a retail value share of 29% in 2010, adding more than a percentage point on 2009. Unilever's lead was due to the entrenched loyalty to its Axe, Rexona and Dove brands, three standard brands that benefited from the trading down trend during the year. In addition, Unilever was remarkably active in advertising campaigns and promotions during the year. The company's three closest rivals are Beiersdorf Middle East with a retail value share of 20%, Hans Schwarzkopf & Henkel with 15% and Procter & Gamble Gulf with 12%.
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- [illegible]
- [illegible]

## PROSPECTS

- Deodorants are expected to show healthy growth over the forecast period, underpinned by the hot and humid weather in the United Arab Emirates. There is unlocked growth potential lying in around 50% of the low-income earners who are expected to adopt usage for the first time over the forecast period; however, the current economic slowdown and job insecurity might hamper this growth.
- [illegible]
- [illegible]

## CATEGORY DATA

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

AED million

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Deodorant Creams | [illegible] | | | | | |
| Deodorant Pumps | | | | | | |
| Deodorant Roll-Ons | | | | | | |
| Deodorant Sprays | | | | | | |
| Deodorant Sticks | | | | | | |
| Deodorant Wipes | | | | | | |
| Deodorants | | | | | | |

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

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

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Deodorant Creams | [illegible] | | |
| Deodorant Pumps | | | |

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Deodorant Roll-Ons
Deodorant Sprays
Deodorant Sticks
Deodorant Wipes
Deodorants

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

Table 3 Deodorants Premium Vs Mass % Analysis 2005-2010

% retail value rsp

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| 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 4 Deodorants 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 5 Deodorants Brand Shares by GBN 2007-2010

% retail value rsp

| Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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| | | | | | | |
|---|---|---|---|---|---|---|
| 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 6 Forecast Sales of Deodorants by Category: Value 2010-2015

AED million

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Deodorant Creams | | | | | | |
| Deodorant Pumps | | | | | | |
| Deodorant Roll-Ons | | | | | | |
| Deodorant Sprays | | | | | | |
| Deodorant Sticks | | | | | | |
| Deodorant Wipes | | | | | | |
| Deodorants | | | | | | |

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

Table 7 Forecast Sales of Deodorants by Category: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Deodorant Creams | | |
| Deodorant Pumps | | |
| Deodorant Roll-Ons | | |
| Deodorant Sprays | | |
| Deodorant Sticks | | |
| Deodorant Wipes | | |
| Deodorants | | |

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

Table 8 Forecast Deodorants Premium Vs Mass % Analysis 2010-2015

% retail value rsp

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

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

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# DEPILATORIES IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Current value sales of depilatories grow by 5% in 2010 to reach AED59 million
- The increase in beauty salons continues to limit the growth rate
- Current value growth of women's razors and blades is fastest in 2010 at 8%
- Unit prices remain stable in 2010 reflecting manufacturers' awareness of consumer price sensitivity
- Reckitt Benckiser Arabia extends its lead to a 29% value share, owing to Veet
- Depilatories is expected to register a constant value CAGR of 3% over the forecast period

## TRENDS

- Although the growth of beauty salons negatively impacted the growth of depilatories over the review period, lower consumer spending in 2010 restored interest in depilatories. Historically, the trend of visiting beauty salons benefited from the availability and affordability of those salons, and more importantly due to the entrenched culture of hair removal at beauty salons across the Middle East, which is becoming more popular amongst expatriates. However, lower consumer confidence in 2010 spurred demand for depilatories as some middle-income consumers shifted to these products.
- Current value sales of depilatories grew by 5% in 2010 as sales reached AED59 million, a lower growth rate than the previous year's 7% on volume grounds. In spite of the large number of expatriates leaving the United Arab Emirates to return to their home countries, depilatories found refuge in a number of consumers – mostly middle-income consumers – who started trading down to depilatories rather than visiting beauty salons.
- On account of product novelty and innovation, women's razors and blades remains the fastest-growing area with current value growth of 8%. The large cosmopolitan community in the United Arab Emirates has spurred the exporting of some of its habits like using depilatories to other cultures, which traditionally rely on hair removers/bleaches. Women in the Middle East are used to hair removers/bleaches as the traditional depilatories product, as shown by the category accounting for 92% of total depilatories sales in 2009.
- Apart from the strong growth of stand-alone beauty salons, as well as those in shopping centres, there has also been an increase in surgeries offering laser hair removal and other methods of permanent hair removal, which will further prevent the growth of depilatories. Hair removal is a common process amongst Middle Eastern women, which is usually conducted on a monthly basis. Most beauty salons in the United Arab Emirates use waxing, while other formats l ke sugaring and threading are also available as they mainly cater for older Arab women. Towards the end of the review period, Western expatriates had started following suit, given the convenience of hair removal in beauty salons, yet their main format remained women's razors and blades.

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## COMPETITIVE LANDSCAPE

- Reckitt Benckiser Arabia extended its lead in depilatories with its retail value share reaching 29%, as Veet drew away from competitors Fem and Jolen, which held value shares of 11% and 10%, respectively in 2010. In addition to the Veet Hair Removal Cream, Veet continued reaping dividends with the Wax Strips range. On account of the entrenched demand in the Middle East for waxing, Veet's Wax Strips cater to a large segment of the United Arab Emirates' population with its offerings for normal, dry and sensitive skins. Similar to regular waxing at beauty salons, the results of Veet's Wax Strips could last for up to a month.
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## PROSPECTS

- During the forecast period, depilatories will continue growing; however, the popularity of beauty salons will limit growth in the market.
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refuge in such a market and across the Middle East in general. They may also offer more home waxing and sugaring kits that will retail at cheaper prices than similar salon treatments.

## CATEGORY DATA

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

AED million

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Hair Removers/Bleaches | | | | | | |
| Women's Pre-Shave | | | | | | |
| Women's Razors and Blades | | | | | | |
| Depilatories | | | | | | |

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

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

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Hair Removers/Bleaches | | | |
| Women's Pre-Shave | | | |
| Women's Razors and Blades | | | |
| Depilatories | | | |

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

Table 3 Depilatories 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 Depilatories Brand Shares by GBN 2007-2010

% retail value rsp

| Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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| | | | | |
|---|---|---|---|---|
| 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 5 Forecast Sales of Depilatories by Category: Value 2010-2015

AED million

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Hair Removers/Bleaches | | | | | | |
| Women's Pre-Shave | | | | | | |
| Women's Razors and Blades | | | | | | |
| Depilatories | | | | | | |

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

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

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Hair Removers/Bleaches | | |
| Women's Pre-Shave | | |
| Women's Razors and Blades | | |
| Depilatories | | |

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

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# 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

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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.

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## 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.
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## 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

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Table 3 Fragrances Company Shares 2006-2010

| % retail value rsp<br>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<br>Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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| | | | | |
|---|---|---|---|---|
| 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 5 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

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% 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

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# HAIR CARE IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Current value sales of hair care grow by 6% in 2010 as sales reach AED412 million
- Mass brands gain value share as lower consumer confidence spreads into the market
- Conditioners and styling agents achieved the highest current value growth of 8% in 2010
- Unit prices are stable as the government intervenes to monitor prices and consumers show price sensitivity
- Hair care remains highly concentrated within the hands of Unilever Gulf and Procter & Gamble Gulf
- Hair care is expected to post a constant value CAGR of 5% during the forecast period

## TRENDS

- Although the United Arab Emirates is known for its high disposable incomes, the hair care category remains dominated by mass brands, which accounted for 98% of value sales in 2010. Shopping trends favour supermarkets, which stock mass brands, and the prevalence of head coverings reduces demand for premium hair products. The economic slowdown has also taken its toll with consumers generally looking for value-for-money products.
- Current value sales of hair care grew by 6% in 2010 as sales reached AED412 million, lower growth than the review period CAGR of 14% given the lower population growth in 2010 and some trading down – amongst certain middle-income consumers – to cheaper hair care brands. Nevertheless, growth is still strong compared to other beauty care categories.
- Consistent growth is helped by the United Arab Emirates' harsh climate, which intensifies the need for effective hair care products to mitigate the negative effects emanating from heat, temperature and humidity. In addition, the desalinated tap water usually results in hair loss and spurs demand for hair care products treating hair loss. The cosmopolitan United Arab Emirates population – hosting expatriates from all over the world in addition to the local population – feeds through into various hairstyles and hence different products to cater to varied consumer needs.
- Conditioners was one of the fastest growing product category with 8% value growth in 2010. The healthy growth of conditioners is due to the gradual sophistication of the market, especially as female consumers target products with specific and higher benefits. With around 60% of the population less than 25 years old, this young and fashion-conscious consumer group spurred demand for specific hair care products during the review period, like colourants, for example. Shampoos continued to grow at 5%, considerably less than conditioners but the category is more mature and actual sales remain higher than conditioners.
- In addition to the standard colourants available on the shelf, the category also includes traditional alternatives like natural henna colourants, which are usually imported from India, Yemen and Saudi Arabia. In general consumers who can afford it get their hair coloured at a salon, but low-income consumers opt for low-to-mid-range colourants they can apply at home.

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- Hair fluids is an emerging range offering product benefits such as antifrizz and silky smooth. Specialist products for antifrizz such as Livon Silky Potion Hair Fluid and Silky Hues Hair Fluid to give colour and shine are heavily advertised in women's magazines.
- In light of the harsh weather conditions in the United Arab Emirates, antidandruff shampoo is particularly popular amongst most nationalities and consumer profiles. Antidandruff has for a long time been dominated by Procter & Gamble's Head & Shoulders; however, such domination had been threatened by Unilever's Clear and Sunsilk Anti-Dandruff. In addition to being new products on the shelf, Unilever's brands came with further value-adding formulas like reducing hair loss and antidryness.
- In addition to these three leading brands, Himalaya's antidandruff range secures sustainable demand in the United Arab Emirates. Firstly, the large Asian expatriate population in the United Arab Emirates benefits Himalaya's brands, which are popular across the Indian Subcontinent and the Far East. Secondly, Himalaya's lower price as opposed to that of multinational brands acts as a major sales driver. Thirdly, the brand's natural offering caters to the growing health awareness in the United Arab Emirates.

## COMPETITIVE LANDSCAPE

- Hair care remained highly concentrated within the hands of Unilever Gulf with a 39% value share and Procter & Gamble Gulf with a 33% value share in 2010. Unilever complemented its existing range, including Sunsilk, with Clear; the antidandruff shampoo managed to displace Procter & Gamble's Head & Shoulders from the leading position within antidandruff shampoos. Procter & Gamble, like Unilever, benefits from strong customer loyalty to its flagship brands, in this case Pantene Pro-V and Head & Shoulders.
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## PROSPECTS

- Constant value sales of hair care are forecast to grow at a conservatively estimated CAGR of 5% to reach AED514 million over the forecast period.
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## CATEGORY DATA

Table 1 Sales of Hair Care by Category: Value 2005-2010

AED million

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| 2-in-1 Products | | | | | | |
| Colourants | | | | | | |
| Conditioners | | | | | | |
| Hair Loss Treatments | | | | | | |
| Perms and Relaxants | | | | | | |
| Salon Hair Care | | | | | | |
| Shampoos | | | | | | |
| - Medicated Shampoos | | | | | | |
| - Standard Shampoos | | | | | | |
| Styling Agents | | | | | | |
| Hair Care | | | | | | |

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

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

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| 2-in-1 Products | | | |
| Colourants | | | |
| Conditioners | | | |
| Hair Loss Treatments | | | |
| Perms and Relaxants | | | |
| Salon Hair Care | | | |
| Shampoos | | | |
| - Medicated Shampoos | | | |
| - Standard Shampoos | | | |
| Styling Agents | | | |
| Hair Care | | | |

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

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Table 3 Hair Care Premium Vs Mass % Analysis 2005-2010

% retail value rsp

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| 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 4 Sales of Styling Agents by Type: % Value Breakdown 2006-2010

% retail value rsp

| | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Gel | | | | | |
| Hairspray/lacquers | | | | | |
| Heat protection spray | | | | | |
| Mousse | | | | | |
| Wax | | | | | |
| Others | | | | | |
| 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 5 Hair Care 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 6 Hair Care Brand Shares by GBN 2007-2010

% retail value rsp

| Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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| | | | | |
|---|---|---|---|---|
| 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 7 Salon Hair Care 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 8 Salon Hair 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 9 Hair Care Premium 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

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Table 10 Forecast Sales of Hair Care by Category: Value 2010-2015

AED million

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| 2-in-1 Products | | | | | | |
| Colourants | | | | | | |
| Conditioners | | | | | | |
| Hair Loss Treatments | | | | | | |
| Perms and Relaxants | | | | | | |
| Salon Hair Care | | | | | | |
| Shampoos | | | | | | |
| - Medicated Shampoos | | | | | | |
| - Standard Shampoos | | | | | | |
| Styling Agents | | | | | | |
| Hair Care | | | | | | |

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

Table 11 Forecast Sales of Hair Care by Category: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| 2-in-1 Products | | |
| Colourants | | |
| Conditioners | | |
| Hair Loss Treatments | | |
| Perms and Relaxants | | |
| Salon Hair Care | | |
| Shampoos | | |
| - Medicated Shampoos | | |
| - Standard Shampoos | | |
| Styling Agents | | |
| Hair Care | | |

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

Table 12 Forecast Hair Care Premium Vs Mass % Analysis 2010-2015

% retail value rsp

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

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

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# MEN'S GROOMING IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Men's grooming products generates sales of AED192 million, representing 9% current value growth in 2010
- Low consumer confidence reduces the penetration of men's grooming products into low-income brackets
- Men's razors and blades achieve the highest current value growth rate of 9% in 2010
- Unit price movement is held back due to the government's price monitoring and the economic downturn
- Procter & Gamble Gulf leads men's grooming products with a 36% retail value share, thanks to wide acceptance of Gillette brand
- Men's grooming products is expected to post a constant value CAGR of 6% during the forecast period

## TRENDS

- In this growing grooming category the premiumisation trend continues, especially in men's skin care. Historically, the term "men's grooming products" usually referred to shaving-related products covering men's shaving, men's pre-shave, men's razors and blades and men's post-shave. The category showed remarkable developments during the review period, which culminated in healthy growth for emerging product areas l ke men's skin care, men's toiletries and men's bath and shower.
- Men's grooming products generated sales of AED192 million in 2010 and a 9% current value increase over 2009. Growth was fuelled by demand for shaving-related products and deodorants as well as the product novelty of men's skin care and hair care products. However, demand for men's skin care products mostly emanates from high-income earners, especially as lower-income groups would consider most of these products non-essential.
- Given its importance, men's razors and blades was the most dynamic category in 2010 and also achieved the highest sales. Men's razors and blades grew by 9% in current value terms in 2010 as sales reached AED103 million, which in turn accounted for 54% of total sales of men's grooming products.
- Men's pre-shave was the second fastest-growing area with a current value growth of 8%. In a year of low consumer spending, most consumers focussed on essential products like men's pre-shave rather than luxury products like men's skin care, the product novelty of which has also started fading.
- Men have an increasing need for products – men's grooming has been present for some time in the United Arab Emirates, with hair salons offering a variety of services like shaving, haircuts, pedicures and massages. In addition, the spa concept is making its way to male

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consumers, especially with Dubai evolving as a regional tourist destination. However, men are generally reluctant and embarrassed to be seen seeking out products in skin care areas.

- Amidst the slowdown, manufacturers and retailers launched a series of promotional offers by the end of the year in an effort to revive demand and return to the earlier growth rates.
- Men's grooming products mostly comprises mass brands, which is in line with men's lesser propensity to spend on cosmetics and toiletries compared to women. The only areas in which men might consume premium brands are men's pre-shave, men's post-shave and men's deodorants, as some high-income earners purchase extensions to favourite fragrances available in these formats. These extensions are widely available at major department stores – Debenhams and Harvey Nichols – and beauty specialist retailers – Paris Gallery, Areej and Faces. In addition to fragrance extensions, there are a number of popular premium ranges in the market like Clarins Men, Biotherm Homme, Lancôme Men, Clinique Skin Supplies for Men and Lab Series Skincare for Men.

## COMPETITIVE LANDSCAPE

- Procter & Gamble Gulf led men's grooming products with a 36% retail value share, thanks to Gillette's customer loyalty and product innovation. Beiersdorf Middle East was in second place with an 11% retail value share, as the Nivea brand benefited from its large advertising expenditure and consumer demand for value-for-money products. Beiersdorf also launched its Eucerin brand Silver Shave, which helps men to prevent irritation and soothes skin after shaving.
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## PROSPECTS

- Men's grooming products are expected to post a constant value CAGR of 6% during the forecast period. Growth rates have been slowed by slower population growth and the economic slowdown, which is reducing the number of new entrants into men's grooming. The market will have difficulty finding new consumers in times of financial instability expected over the first year or two of the forecast period.

## CATEGORY DATA

Table 1 Sales of Men's Grooming by Category: Value 2005-2010

AED million

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Men's Shaving | | | | | | |
| - Men's Post-Shave | | | | | | |
| - Men's Pre-Shave | | | | | | |
| - Men's Razors and Blades | | | | | | |
| Men's Toiletries | | | | | | |
| - Men's Bath and Shower | | | | | | |
| - Men's Deodorants | | | | | | |
| - Men's Hair Care | | | | | | |
| - Men's Skin Care | | | | | | |
| Men's Grooming | | | | | | |

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

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Table 2 Sales of Men's Grooming by Category: % Value Growth 2005-2010

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Men's Shaving | | | |
| - Men's Post-Shave | | | |
| - Men's Pre-Shave | | | |
| - Men's Razors and Blades | | | |
| Men's Toiletries | | | |
| - Men's Bath and Shower | | | |
| - Men's Deodorants | | | |
| - Men's Hair Care | | | |
| - Men's Skin Care | | | |
| Men's Grooming | | | |

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

Table 3 Sales of Men's Razors and Blades by Type: % Value Breakdown 2006-2010

% retail value rsp

| | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Disposables | | | | | |
| Systems | | | | | |
| Systems - Razors | | | | | |
| Systems - Refill Blades | | | | | |
| Other Razors and Blades | | | | | |
| 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 Men's Grooming 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 5 Men's Grooming Brand Shares by GBN 2007-2010

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% 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 6 Men's Razors and Blades 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 7 Forecast Sales of Men's Grooming by Category: Value 2010-2015

AED million

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Men's Shaving | | | | | | |
| - Men's Post-Shave | | | | | | |
| - Men's Pre-Shave | | | | | | |
| - Men's Razors and Blades | | | | | | |
| Men's Toiletries | | | | | | |
| - Men's Bath and Shower | | | | | | |
| - Men's Deodorants | | | | | | |
| - Men's Hair Care | | | | | | |
| - Men's Skin Care | | | | | | |

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Men's Grooming

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

Table 8 Forecast Sales of Men's Grooming by Category: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Men's Shaving | | |
| - Men's Post-Shave | | |
| - Men's Pre-Shave | | |
| - Men's Razors and Blades | | |
| Men's Toiletries | | |
| - Men's Bath and Shower | | |
| - Men's Deodorants | | |
| - Men's Hair Care | | |
| - Men's Skin Care | | |
| Men's Grooming | | |

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

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# ORAL CARE IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Current value sales of oral care grow by 8% in 2010 to reach AED358 million
- Promotional and awareness campaigns continue spurring sales in 2010
- Manual toothbrushes achieve the highest current value growth of 9%
- Procter & Gamble Gulf leads oral care in 2010 with a 35% retail value share
- Oral care is expected to post a constant value CAGR of 5% during the forecast period

## TRENDS

- Oral care grew by 8% in current value terms in 2010 to reach AED358 million, up from AED332 in 2009. The lower growth rate in 2010 compared to the 11% current value CAGR registered over the review period was mainly volume driven, as the low population growth and exodus of expatriates during the year impacted oral care's consumer base.
- Promotion and awareness remains the key theme in oral care in 2010, especially as the United Arab Emirates lags behind many parts of the world in oral care standards. Leading manufacturers like Procter & Gamble and Unilever have increased awareness campaigns for oral care through educational campaigns and charities. A number focussed on installing a daily oral care regimen. Amongst the campaigns launched during the year was the Healthy Smiles Day, an event educating children about the importance of oral hygiene that was arranged by the Ministry of Health and Procter & Gamble's Oral-B and Crest.
- Manual toothbrushes was the fastest-growing category with current value growth of 9% in 2010. These remain one of the most significant products within oral care and with increasing awareness of dental hygiene consumers in the UAE are changing their toothbrushes more often. In addition to lower demand for power/electric toothbrushes, given their high unit prices, the increasing oral hygiene awareness has started bearing fruit, with consumers changing their manual toothbrushes more frequently than before.
- Toothpaste is the most popular oral hygiene product with a 62% value share in 2010, followed by manual toothbrushes with 33%. The frequency of purchasing explains the large gap in value shares, as toothpaste is purchased on a bimonthly or monthly basis, whereas manual toothbrushes are purchased quarterly or even more rarely. Together, both toothpaste and manual toothbrushes accounted for 95% of total oral hygiene sales during the year.
- Oral hygiene is still a mass market area in the United Arab Emirates as it is not developed enough to support premium products. As far as toothpaste is concerned, the market only offers mass brands, although prices vary slightly from brand to brand, with Sensodyne being slightly more expensive than Colgate, for example.

## COMPETITIVE LANDSCAPE

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- Procter & Gamble Gulf led oral care in 2010 with a retail value share of 35%, up by one percentage point on 2009. The company's sustained leadership is due to the entrenched popularity of its two main oral care brands – Oral-B and Crest. The former is the best-selling toothbrush brand in the United Arab Emirates, whilst the latter is the second largest toothpaste, just behind Colgate. In terms of brands, Colgate retained the best-selling brand position in the United Arab Emirates with a retail share of 25% of total value sales in 2010.
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## PROSPECTS

- There will be an opportunity in oral hygiene to attract more consumers by raising awareness of the importance of dental hygiene and healthy teeth and gums. Health awareness and education is increasing as the Ministry of Health will continue to aspire to and implement strategies to bring the United Arab Emirates up to Western standards. This is particularly evident in schools, where sponsored campaigns by Procter & Gamble or Unilever are regularly carried out.
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## CATEGORY DATA

Table 1 Sales of Oral Care by Category: Value 2005-2010

AED million

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Dental Floss | | | | | | |
| Denture Care | | | | | | |
| Mouth Fresheners | | | | | | |
| Mouthwashes/Dental Rinses | | | | | | |
| Tooth Whiteners | | | | | | |
| Toothbrushes | | | | | | |
| Toothpaste | | | | | | |
| Oral Care | | | | | | |

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: Oral Care total excludes the category total for manual and power toothbrushes

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

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Dental Floss | | | |
| Denture Care | | | |
| Mouth Fresheners | | | |
| Mouthwashes/Dental Rinses | | | |
| Tooth Whiteners | | | |
| Toothbrushes | | | |
| Toothpaste | | | |
| Oral Care | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 3 Sales of Manual and Power Toothbrushes by Type: Value 2005-2010

AED million

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Manual Toothbrushes | | | | | | |
| Power Toothbrushes | | | | | | |
| - Battery Toothbrushes | | | | | | |
| -- Battery Toothbrush Replacement Heads | | | | | | |
| -- Battery Toothbrush Units | | | | | | |
| - Electric Toothbrushes | | | | | | |
| -- Electric Toothbrush Replacement Heads | | | | | | |
| -- Electric Toothbrush Units | | | | | | |
| Toothbrushes | | | | | | |

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

Table 4 Sales of Manual and Power Toothbrushes by Type: % Value Growth 2005-2010

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Manual Toothbrushes | | | |
| Power Toothbrushes | | | |
| - Battery Toothbrushes | | | |
| -- Battery Toothbrush Replacement Heads | | | |
| -- Battery Toothbrush Units | | | |
| - Electric Toothbrushes | | | |
| -- Electric Toothbrush Replacement Heads | | | |
| -- Electric Toothbrush Units | | | |

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| | | | |
|---|---|---|---|
| Toothbrushes | 8.2 | 11.3 | 70.7 |

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

Table 5 Sales of Toothpaste by Type: % Value Breakdown 2006-2010

% retail value rsp

| | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Children's | | | | | |
| Sensitive | | | | | |
| Standard/Traditional | | | | | |
| Therapeutic/Medicinal | | | | | |
| Total Care/Complete Care | | | | | |
| Whitening | | | | | |
| Others | | | | | |
| 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 6 Oral Care 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 7 Oral Care Brand Shares by GBN 2007-2010

% retail value rsp

| Brand | Company | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|

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| | | | | |
|---|---|---|---|---|
| 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 Forecast Sales of Oral Care by Category: Value 2010-2015

AED million

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Dental Floss | | | | | | |
| Denture Care | | | | | | |
| Mouth Fresheners | | | | | | |
| Mouthwashes/Dental Rinses | | | | | | |
| Tooth Whiteners | | | | | | |
| Toothbrushes | | | | | | |
| Toothpaste | | | | | | |
| Oral Care | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 9 Forecast Sales of Oral Care by Category: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Dental Floss | | |
| Denture Care | | |
| Mouth Fresheners | | |
| Mouthwashes/Dental Rinses | | |
| Tooth Whiteners | | |
| Toothbrushes | | |
| Toothpaste | | |
| Oral Care | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 10 Forecast Sales of Manual and Power Toothbrushes by Type: Value 2010-2015

AED million

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Manual Toothbrushes | | | | | | |
| Power Toothbrushes | | | | | | |
| - Battery Toothbrushes | | | | | | |
| -- Battery Toothbrush Replacement Heads | | | | | | |
| -- Battery Toothbrush Units | | | | | | |
| - Electric Toothbrushes | | | | | | |
| -- Electric Toothbrush Replacement Heads | | | | | | |
| -- Electric Toothbrush | | | | | | |

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Units
Toothbrushes

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

Table 11 Forecast Sales of Manual and Power Toothbrushes by Type: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Manual Toothbrushes | | |
| Power Toothbrushes | | |
| - Battery Toothbrushes | | |
| -- Battery Toothbrush Replacement Heads | | |
| -- Battery Toothbrush Units | | |
| - Electric Toothbrushes | | |
| -- Electric Toothbrush Replacement Heads | | |
| -- Electric Toothbrush Units | | |
| Toothbrushes | | |

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

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# SKIN CARE IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Skin care posts current value growth of 8% as sales reach AED418 million in 2010
- In addition to climactic factors, skin care benefits from the opening of branded beauty salons
- Facial care achieves the highest current value growth rate in 2010, up by 9%
- Unit prices are stable as manufacturing costs remain stable
- Beiersdorf Middle East leads with a 16% retail value share, but skin care remains fragmented
- Skin care is expected to post a constant value CAGR of 5% over the forecast period

## TRENDS

- Key trends in 2010 have revolved around new product launches and an expanding retail environment. Branded beauty salons and specialised beauty retailers have expanded into their own mall-based stores, including Nivea Haus, which includes a treatment centre for women and men in addition to a skin care consultation centre and a retail store and Dermalogica Skincare Centre. On the product front, product innovation remained skin care's regular trend, with dozens of key launches, from the main leaders Beiersdorf and Johnson & Johnson, who are focusing on expanding the anti-aging and antiwrinkle cream markets.
- Skin care posted 8% current value growth as sales reached AED418 million in 2010, although this was lower growth compared to the review period CAGR of 14% as the global financial crisis took its toll. Demand from the resident population was impacted by slower population growth in 2010 as thousands of expatriates left to return to their home countries, resulting in a smaller consumer base for skin care. Economic hardship has forced some consumers to trade down to cheaper brands, regardless of the strong brand loyalty in a product area like skin care.
- Despite the economic conditions, the key demand driver for skin care remains the weather. The extremely hot climate and the drying, dehydrating effects of constant air conditioning throughout the hot summer months in the United Arab Emirates sustains strong demand for nourishing and soothing skin products to counter the negative effects of these harsh environments.
- Facial care, driven by face masks and facial moisturisers, achieved the highest growth rate in 2010 with a 9% current value sales increase to reach AED235 million, the largest within skin care as it accounted for 56% of total value sales during the year. Facial care continued outperforming hand care and body care, current value sales of which grew by 8% and 7%, respectively. Facial care fared so well despite the economic climate largely because women were unwilling to compromise on products they use on their face and continued to look for better, more effective products, particularly with age-defying and, increasingly, whitening properties.
- Facial care's growth was supported by buoyant categories like nourishers/anti-agers, which posted 8% current value growth in 2010, accounted for 27% of total value sales of skin care

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and is one of the growth areas of this category. Manufacturers responded to this trend and the majority of product launches contained some sort of nourisher or anti-aging element.

- Facial care products are the most popular in the United Arab Emirates, accounting for 57% of total skin care value sales in 2010, followed by body care and hand care with 41% and 3%, respectively. Facial care is so important because consumers have gradually become more discerning about targeted body products versus a historical one-product-fits-all mind-set. Facial care is of the utmost importance to all women, taking into consideration that the facial care process needs different sophisticated products at different stages, unlike body or hand care, where one basic product would be adequate for most women.
- In light of the beauty salon culture in the United Arab Emirates, beauty salons offer a range of natural facial treatments, which act as product alternatives to regular skin care products. These treatments mostly include natural ingredients like honey, almond and yoghurt, to name a few. The economic slowdown reduced consumer spending on more expensive treatments to benefit more mass market offerings.
- Skin-whitening skin care products are available on the shelf, mostly from standard brands l ke Unilever's Fair & Lovely. Despite health warnings, manufacturers have reported growing demand for skin-whitening products.
- Throughout the review period, demand for premium products grew, and there continues to be an explosion skin care offerings, particularly at the premium end. Product offerings are replicating everything from sophisticated salon and cosmetic surgery offerings to the promise of wrinkle reducers and anti-ageing products. Products are targeted at specific age groups with unique selling propositions stimulating demand amongst consumers for products they never knew they needed.

## COMPETITIVE LANDSCAPE

- Beiersdorf Middle East led skin care in 2010 with a 16% retail value share, highlighting the category's fragmented status. Skin care remained highly competitive, especially on account of continuous product innovation. The top three manufacturers – Beiersdorf, L'Oréal and Unilever – continued jostling for the number one spot; however, all were roughly on a par with one another with retail value shares of 16%, 15% and 14%, respectively.
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## PROSPECTS

- Skin care is scheduled to post a constant value CAGR of 5% over the forecast period, lower than the review period constant value CAGR of 6%. This is to be expected given the slowdown in population growth and purchasing power.

## CATEGORY DATA

Table 1 Sales of Skin Care by Category: Value 2005-2010

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AED million

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Body Care | | | | | | |
| - Firming/Anti-Cellulite Body Care | | | | | | |
| - General Purpose Body Care | | | | | | |
| Facial Care | | | | | | |
| - Acne Treatments | | | | | | |
| - Face Masks | | | | | | |
| - Facial Cleansers | | | | | | |
| - Facial Moisturisers | | | | | | |
| - Lip Care | | | | | | |
| - Nourishers/Anti-Agers | | | | | | |
| - Toners | | | | | | |
| Hand Care | | | | | | |
| Skin Care | | | | | | |

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

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

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Body Care | | | |
| - Firming/Anti-Cellulite Body Care | | | |
| - General Purpose Body Care | | | |
| Facial Care | | | |
| - Acne Treatments | | | |
| - Face Masks | | | |
| - Facial Cleansers | | | |
| - Facial Moisturisers | | | |
| - Lip Care | | | |
| - Nourishers/Anti-Agers | | | |
| - Toners | | | |
| Hand Care | | | |
| Skin Care | | | |

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

Table 3 Skin Care Premium Vs Mass % Analysis 2005-2010

% retail value rsp

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| 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 4 Skin Care Company Shares 2006-2010

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% 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 5 Skin 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 6 Skin Care Premium Brand Shares by GBN 2007-2010

% retail value rsp

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| 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 7 Forecast Sales of Skin Care by Category: Value 2010-2015

AED million

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|

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

Table 8 Forecast Sales of Skin Care by Category: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Body Care | | |
| - Firming/Anti-Cellulite Body Care | | |
| - General Purpose Body Care | | |
| Facial Care | | |
| - Acne Treatments | | |
| - Face Masks | | |
| - Facial Cleansers | | |
| - Facial Moisturisers | | |
| - Lip Care | | |
| - Nourishers/Anti-Agers | | |
| - Toners | | |
| Hand Care | | |
| Skin Care | | |

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

Table 9 Forecast Skin Care Premium Vs Mass % Analysis 2010-2015

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| % retail value rsp | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

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

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# SUN CARE IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Current value sales of sun care grow by 7% in 2010 to reach AED15 million
- Despite low consumer confidence health and beauty concerns stimulate demand for sun care
- Aftersun and sun protection see the highest current value growth rates of 7%
- Beiersdorf Middle East leads sun care with a 22% retail value share, thanks to the Nivea Sun range
- Sun care is anticipated to register a constant value CAGR of 5% over the forecast period

## TRENDS

- Current value sales of sun care grew by 7% in 2010 as sales reached AED15 million – slower growth compared to the review period CAGR of 12%, echoing a similar drop in expatriate and tourist arrivals. It should be highlighted that demand from local nationals remained negligible in light of the traditional conservative clothing habits, which limits going to the beach and hence the consumption of sun care products.
- Aftersun and sun protection were the fastest-growing areas with 7% current value increases for both. Aftersun generated retail value sales of AED2 million in 2010, benefiting from the growing awareness of sunlight's dangers coupled with the year's key launches. Historically, consumers used to pay attention mainly to protection before and during their exposure to sunlight; even if the need arose for aftersun protection, many consumers used general purpose body care instead as a replacement for aftersun. However, the various awareness campaigns notably launched by L'Oréal Groupe coupled with the availability and, more importantly, the affordability of various aftersun products boosted growth.
- Sun protection posted similar growth of 7% as it generated sales of AED12 million, thus accounting for the lion's share of sun care with 78% of total value sales during the year. In spite of product innovation and the penetration of aftersun, sun protection remains the mainstay within sun care.
- Self-tanning products are becoming popular, especially amongst young female expatriates, who follow the latest trends but are reluctant to sit in the sun for a long time because of the United Arab Emirates' hot and humid weather for around eight months of the year. This demand is also met by wide product availability, especially from premium brands l ke Lancaster, Shiseido and Christian Dior, to name a few of the available self-tanning premium brands that consumers usually trust for effective results. Current value sales of self-tanning grew by 6% to record value sales of AED1 million.
- The lower inflation rate in 2010 coupled with the government's intervention to control grocery prices and the continuous product innovation have worked collectively to keep retail prices in balance.
- Harsh weather conditions in the United Arab Emirates have spurred demand for sun care products with high sun protection factors (SPF. As part of the growing campaign to protect

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against sunburn, physicians across the United Arab Emirates have explicitly recommended using a sun care product with an SPF of 30 and above on a daily basis.

## COMPETITIVE LANDSCAPE

- Beiersdorf Middle East continued to lead in sun care with a 22% value share in 2010. In addition to eliciting strong customer loyalty and trust in the United Arab Emirates, Beiersdorf benefited from a number of key launches during the year l ke the Nivea After range, which includes the Moisturising After Sun Spray, Moisturising After Sun Lotion, Rich Care After Sun Lotion, Regenerating After Sun Treatment and Tan Prolonging After Sun Lotion, all fortified with either aloe vera or almond oil.
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## PROSPECTS

- In spite of the increasing health consciousness of the dangers of sunlight, there is still an unlocked potential in the market for a countrywide campaign on the need for sun protection and the dangers of sun exposure. It is anticipated that such a campaign will take place during the forecast period, when one of the leading manufacturers will pounce on the opportunity and collaborate with the Ministry of Health.
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## CATEGORY DATA

Table 1 Sales of Sun Care by Category: Value 2005-2010

AED '000

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Aftersun | | | | | | |
| Self-Tanning | | | | | | |
| Sun Protection | | | | | | |
| Sun Care | | | | | | |

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

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

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Aftersun | | | |
| Self-Tanning | | | |
| Sun Protection | | | |
| Sun Care | | | |

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

Table 3 Sun Care Premium Vs Mass % Analysis 2005-2010

% retail value rsp

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| 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

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Table 4 Sun Care 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 5 Sun 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 6 Forecast Sales of Sun Care by Category: Value 2010-2015

AED '000

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Aftersun | | | | | | |
| Self-Tanning | | | | | | |
| Sun Protection | | | | | | |
| Sun Care | | | | | | |

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

Table 7 Forecast Sales of Sun Care by Category: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|
| Aftersun | | |
| Self-Tanning | | |

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| | |
|---|---|
| Sun Protection | |
| Sun Care | |

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

Table 8 Forecast Sun Care Premium Vs Mass % Analysis 2010-2015

| % retail value rsp | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

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

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# SETS/KITS IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

## HEADLINES

- Current value sales of sets/kits grow by 10% in 2010 to reach AED91 million
- Demand for sets/kits increases amidst consumers' search for value-for-money products
- Sets/kits continues to be associated with fragrances
- Sets/kits remains highly fragmented, although largely in the premium segment
- Sets/kits is expected to register a constant value CAGR of 7% over the forecast period

## TRENDS

- Even though sets and kits are premium purchases, they fared well during the economic downturn as people consider them a better option, particularly for gifts, than a single fragrance, which generally retails within the same price range. The year 2010 accordingly witnessed an active sets/kits category with several launches during the year. Sets/kits grew by 10% in current value terms in 2010 as sales reached AED91 million. This growth level is down on the review period CAGR of 19% in current value terms although the category continued to perform well despite the economic slowdown.
- Gift sets are the most popular in the United Arab Emirates, and they are mostly available in department stores, especially Debenhams and Harvey Nichols, and beauty specialist retailers like Paris Gallery, Areej, Sephora, Faces and The Body Shop. The arrival of new department stores in 2010 like Galeris Lafayette and Bloomingdale's has also boosted the presence of sets/kits. Multiproduct sets are on the verge of becoming popular as many female consumers appreciate the convenience such sets provide.
- Sets/kits are mostly available in three categories. Firstly, there are the fragrances-centred sets available through department stores and beauty specialist retailers. These sets usually include a bottle of premium fragrance in addition to one or two extensions of the same fragrance, like a deodorant, shower gel, aftershave, shaving foam, etc. The cost of such sets ranges between AED250-350 for men's fragrances and AED300-400 for women's fragrances, and they are available from many manufacturers/brands.
- Secondly, there are cosmetics sets that usually include a variety of skin care products and/or colour cosmetics, all wrapped in a gift box or a gift bag. These cosmetics-centred sets are particularly popular from brands like Clinique, Estée Lauder and Clarins. They are available at department stores and beauty specialist retailers.
- Thirdly, there are gift sets centred on bath and shower products, which usually include a variety of premium bath and shower products all wrapped together in a gift basket or box. These gift sets are available from bath and shower retailers like The Body Shop, Crabtree & Evelyn, L'Occitane and other similar retailers.
- In many cases, it has been found that the price of sets/kits is just slightly higher than that of individual products, which has, in turn, boosted demand for such sets/kits. Promotional activity including gifts with purchase (GWP) is also becoming popular in many department stores and beauty specialist retailers, and it usually involves a free bag and trial products with every

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purchase of around AED400-500. Recently, most premium beauty and personal care brands have embarked on such GWP schemes, including Shiseido, Make Up Forever, Lancôme, Givenchy, Guerlain, Clinique, Clarins, La Prairie, Helena Rubinstein, Versace, Boss and Giorgio Armani, to name a few. Others like Nina Ricci and Ralph Lauren, for example, provide a certain gift with any 100ml fragrance.

- Sets/kits are available all year around, with a focus on major festivities like Christmas, New Year's Eve, Eid Al Adha and Eid Al Fitr, times at which many resident expatriates in the United Arab Emirates travel to their home countries and are highly likely to purchase such sets/kits.

## COMPETITIVE LANDSCAPE

- As already mentioned, the market boasts three different categories of gift sets. For sets that are fragrances centred, there are a large number of sets on shelves from premium manufacturers/brands, where the most widely present are Hugo Boss, Polo Ralph Lauren, Giorgio Armani, Emporio Armani and Burberry, to name a few of the large variety of gift sets brands in the market. As for colour cosmetics-centred sets, these are normally available from premium manufactures/brands like Christian Dior, Chanel, Clinique, Clarins and Estée Lauder.

## PROSPECTS

- Sets/kits will continue to perform well over the forecast period, albeit not achieving such high growth rates as in the review period, largely due to low tourist arrivals expected until the economic recovery strengthens in 2011/2012. Skin care and fragrances-based sets will continue to be the most popular, and value sales of these sets will also be higher as nail care and body care sets tend to retail at lower prices.
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## CATEGORY DATA

Table 1 Sales of Sets/Kits: Value 2005-2010

AED million

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Sets/Kits | | | | | | |

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

Table 2 Sales of Sets/Kits: % Value Growth 2005-2010

% current value growth

| | 2009/10 | 2005-10 CAGR | 2005/10 Total |
|---|---|---|---|
| Sets/Kits | | | |

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

Table 3 Sets/Kits Premium Vs Mass % Analysis 2005-2010

% retail value rsp

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| 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 4 Sets/Kits 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 5 Forecast Sales of Sets/Kits: Value 2010-2015

AED million

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Sets/Kits | | | | | | |

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

Table 6 Forecast Sales of Sets/Kits: % Value Growth 2010-2015

% constant value growth

| | 2010-15 CAGR | 2010/15 TOTAL |
|---|---|---|

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Sets/Kits

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

Table 7 Forecast Sets/Kits Premium Vs Mass % Analysis 2010-2015

| % retail value rsp | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|
| Premium | | | | | | |
| Mass | | | | | | |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

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

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