



Passport

Luxury Goods in the United Kingdom

Euromonitor International

November 2021

This sample report is for illustration purposes only.

Some content and data have been changed.

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LUXURY GOODS IN THE UNITED KINGDOM - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Luxury goods in 2021: The big picture

In 2020, the world experienced a difficult year full of unexpected changes and disruptions, and

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“Dopamine dressing” and “revenge spending” drive local demand

In general, the luxury goods industry has bounced back strongly from the COVID-19 pandemic in 2021, despite continued disruptions to tourism, which is a key driver of sales

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Sustainability and resale continue to be top-of-mind for consumers

The movement towards more environmentally-friendly luxury consumption was only accelerated by the pandemic in 2020 in 2021, as consumers who spent time confined to their

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Competitive landscape

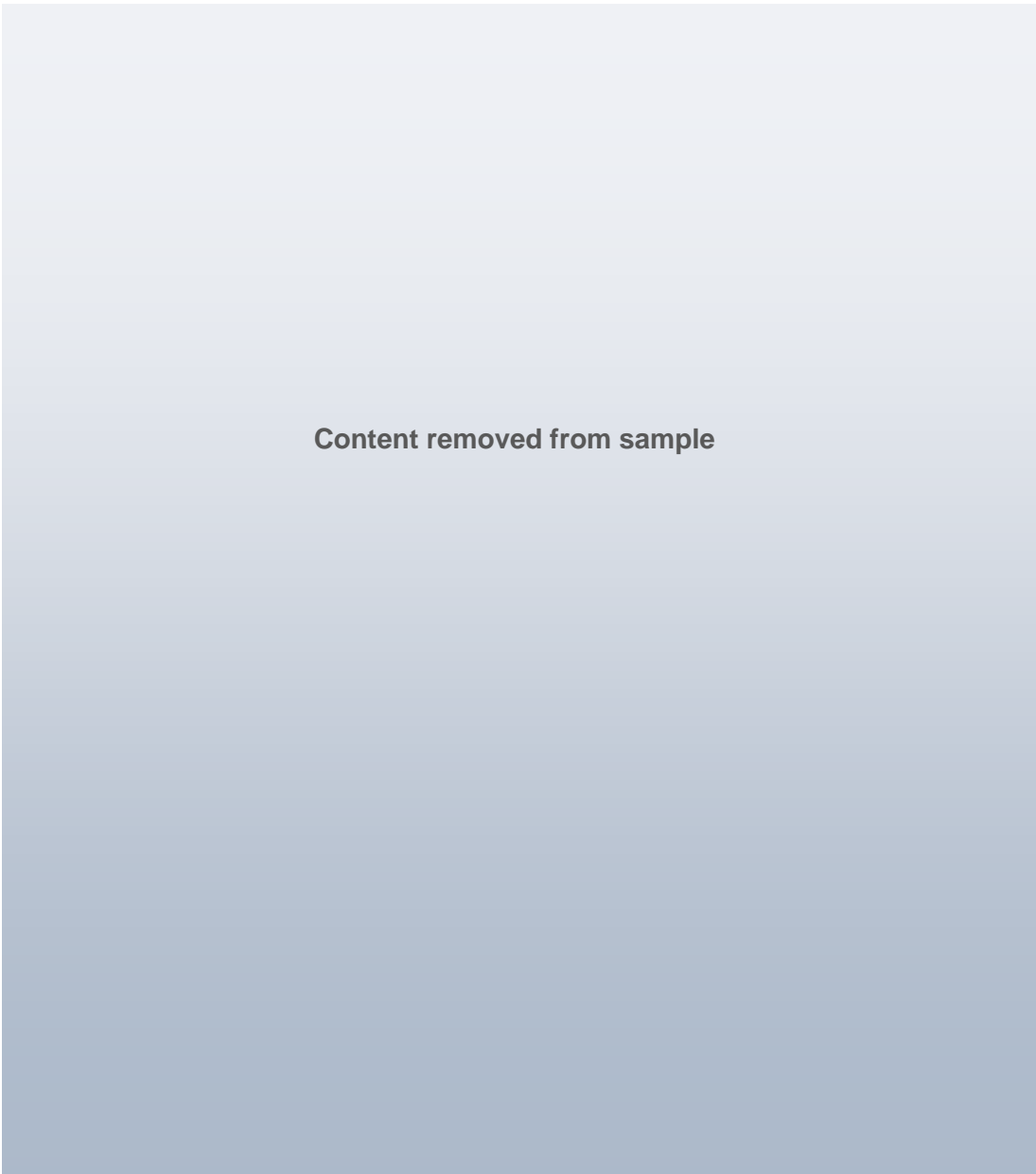
Despite the turbulence of the last year negatively impacting the luxury goods industry, strong heritage brands have been more resilient and have seen impressive recovery. This is because

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Retailing developments

One crucial development since the pandemic is that a significant percentage of sales of personal luxury goods in the UK are now taking place online, with a massive share increase for



What next for luxury goods?

In the forecast period, consumers will continue to demand luxury goods that are distinctive and bring meaning to their lives, thus heritage brands with the backing of conglomerates such

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MARKET DATA

Table 1 Sales of Luxury Goods by Category: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
Luxury Foodservice	Data removed from sample					
Luxury Hotels						
Experiential Luxury						
Fine Wines						
Luxury Spirits						
Fine Wines/Champagne and Spirits						
Premium and Luxury Cars						
Designer Apparel and Footwear (Ready-to-Wear)						
Luxury Eyewear						
Luxury Jewellery						
Luxury Leather Goods						
Luxury Portable Consumer Electronics						
Luxury Timepieces						
Luxury Writing Instruments and Stationery						
Super Premium Beauty						

and Personal Care
 Personal Luxury
 Luxury Goods

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

Table 2 Sales of Luxury Goods by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Luxury Foodservice	Data removed from sample		
Luxury Hotels			
Experiential Luxury			
Fine Wines			
Luxury Spirits			
Fine Wines/Champagne and Spirits			
Premium and Luxury Cars			
Designer Apparel and Footwear (Ready-to-Wear)			
Luxury Eyewear			
Luxury Jewellery			
Luxury Leather Goods			
Luxury Portable Consumer Electronics			
Luxury Timepieces			
Luxury Writing Instruments and Stationery			
Super Premium Beauty and Personal Care			
Personal Luxury			
Luxury Goods			

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

Table 3 Inbound Receipts for Luxury Goods by Country of Origin: Value 2016-2021

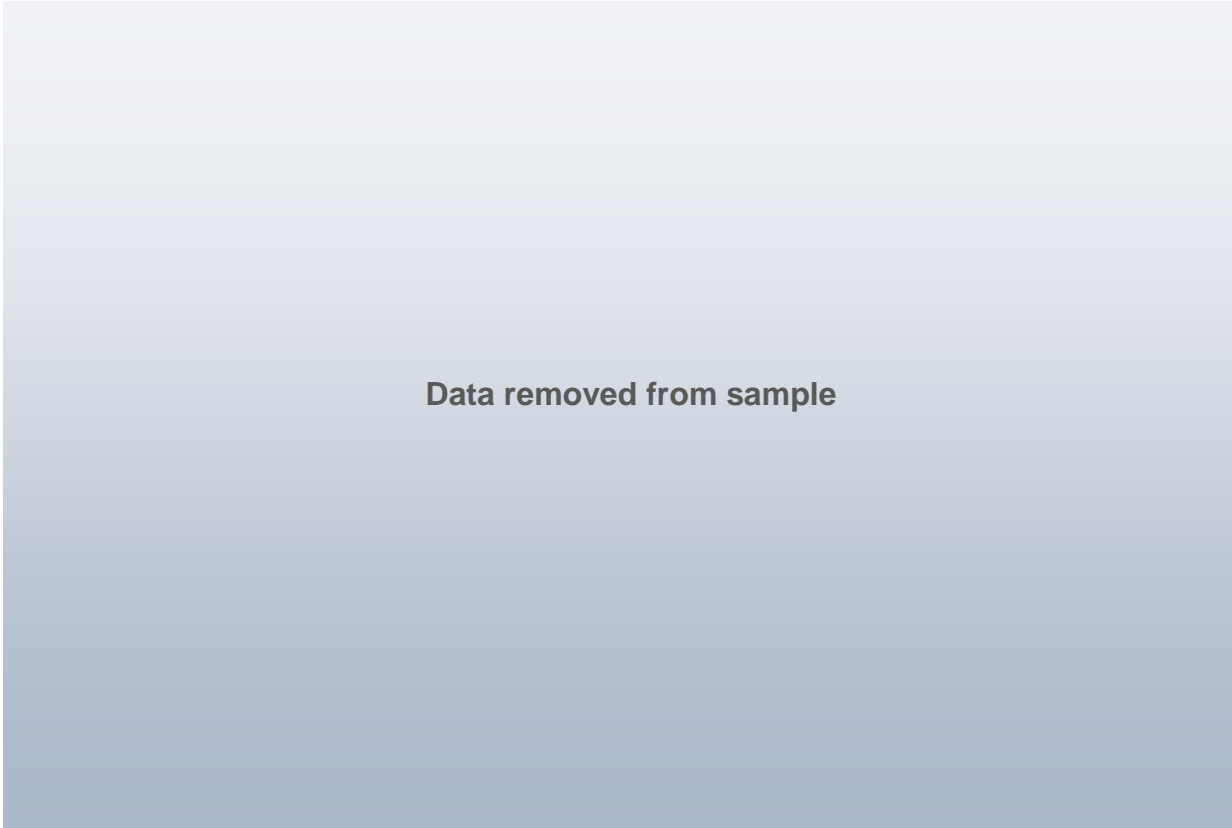
GBP Million

	2016	2017	2018	2019	2020	2021
Brazil	Data removed from sample					
China						
France						
GCC Countries						
Germany						
Japan						
Russia						
South Korea						
United Kingdom						
US						
Other						
Total						

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

Table 4 NBO Company Shares of Luxury Goods: % Value 2016-2020

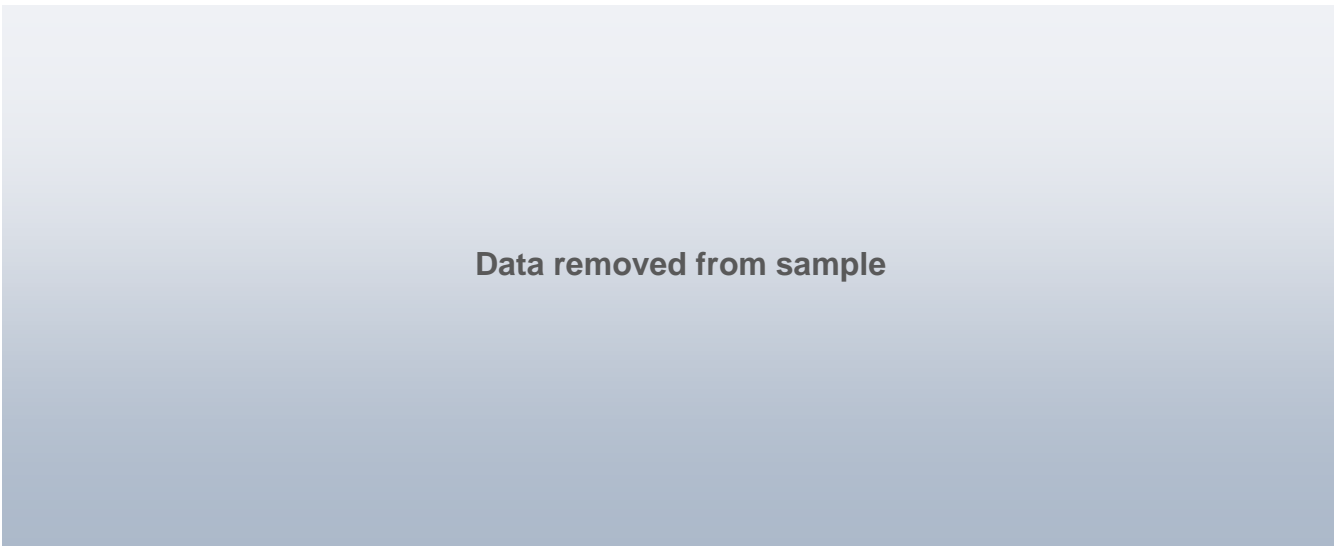
% retail value rsp Company	2016	2017	2018	2019	2020
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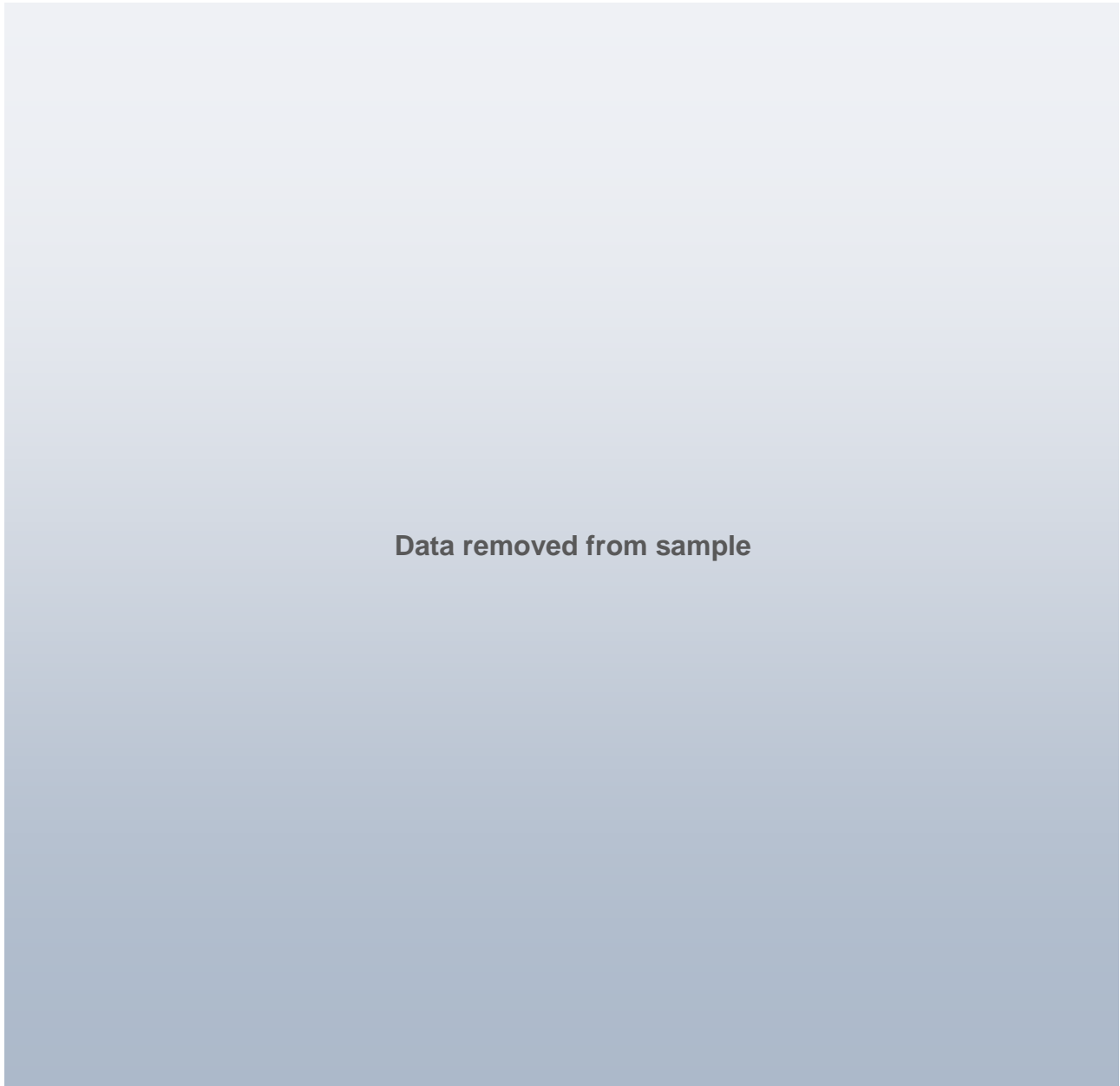


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 LBN Brand Shares of Luxury Goods: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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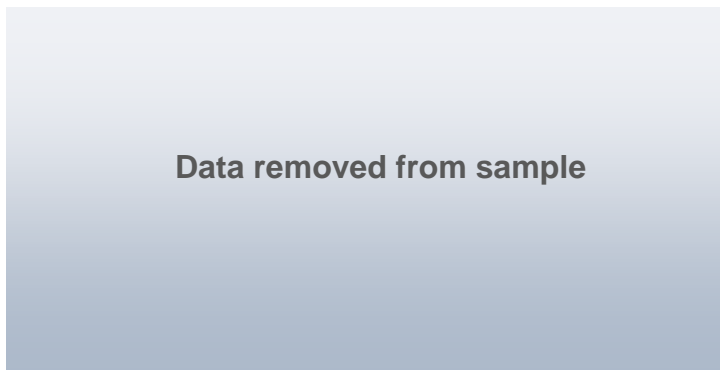




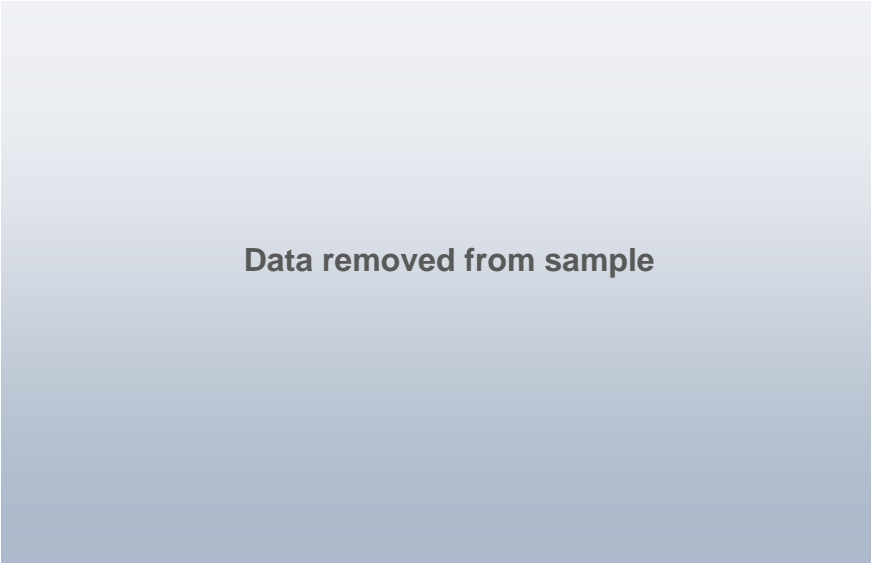
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 **Distribution of Luxury Goods by Format and Category: % Value 2021**

% retail value rsp



Store-Based Retailing
 - Grocery Retailers
 - Non-Grocery Specialists
 - Mixed Retailers
 Non-Store Retailing
 - E-Commerce
 Total



Store-Based Retailing
 - Grocery Retailers
 - Non-Grocery Specialists
 - Mixed Retailers
 Non-Store Retailing
 - E-Commerce
 Total

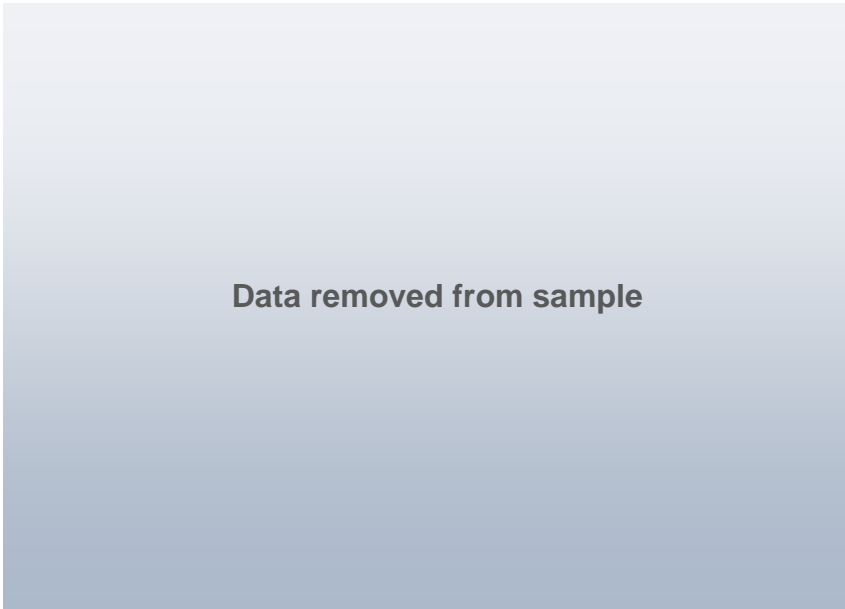
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Key: FWCS = fine wines/champagne and spirits; PL = personal luxury; DAF = designer apparel and footwear (ready-to-wear); LE = luxury eyewear; LJ = luxury jewellery; LLG = luxury leather goods; LPCE = luxury portable consumer electronics; LT = luxury timepieces; LWS = luxury writing instruments and stationery; SPBPC = super premium beauty and personal care

Table 7 Forecast Sales of Luxury Goods by Category: Value 2021-2026

GBP million

	2021	2022	2023	2024	2025	2026
--	------	------	------	------	------	------

Luxury Foodservice
 Luxury Hotels
 Experiential Luxury
 Fine Wines
 Luxury Spirits
 Fine Wines/Champagne
 and Spirits
 Premium and Luxury Cars
 Designer Apparel and
 Footwear (Ready-to-Wear)
 Luxury Eyewear
 Luxury Jewellery
 Luxury Leather Goods
 Luxury Portable
 Consumer Electronics
 Luxury Timepieces
 Luxury Writing
 Instruments and
 Stationery
 Super Premium Beauty
 and Personal Care
 Personal Luxury
 Luxury Goods



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

Table 8 Forecast Sales of Luxury Goods by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Luxury Foodservice	Data removed from sample		
Luxury Hotels			
Experiential Luxury			
Fine Wines			
Luxury Spirits			
Fine Wines/Champagne and Spirits			
Premium and Luxury Cars			
Designer Apparel and Footwear (Ready-to-Wear)			
Luxury Eyewear			
Luxury Jewellery			
Luxury Leather Goods			
Luxury Portable Consumer Electronics			
Luxury Timepieces			
Luxury Writing Instruments and Stationery			
Super Premium Beauty and Personal Care			
Personal Luxury			
Luxury Goods			

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

DISCLAIMER

Forecast closing date: 8 November 2021
 Report closing date: 24 November 2021

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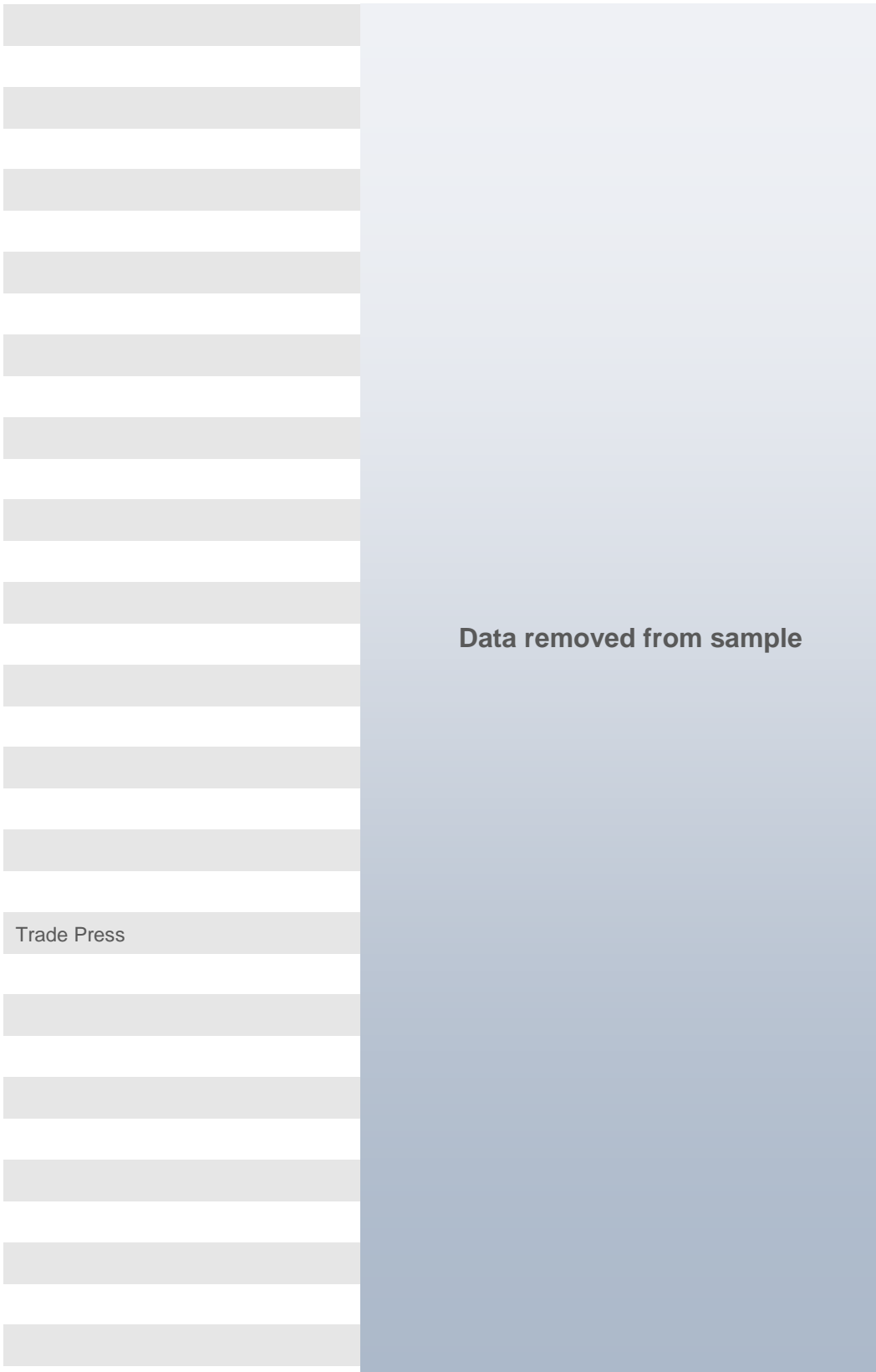
SOURCES

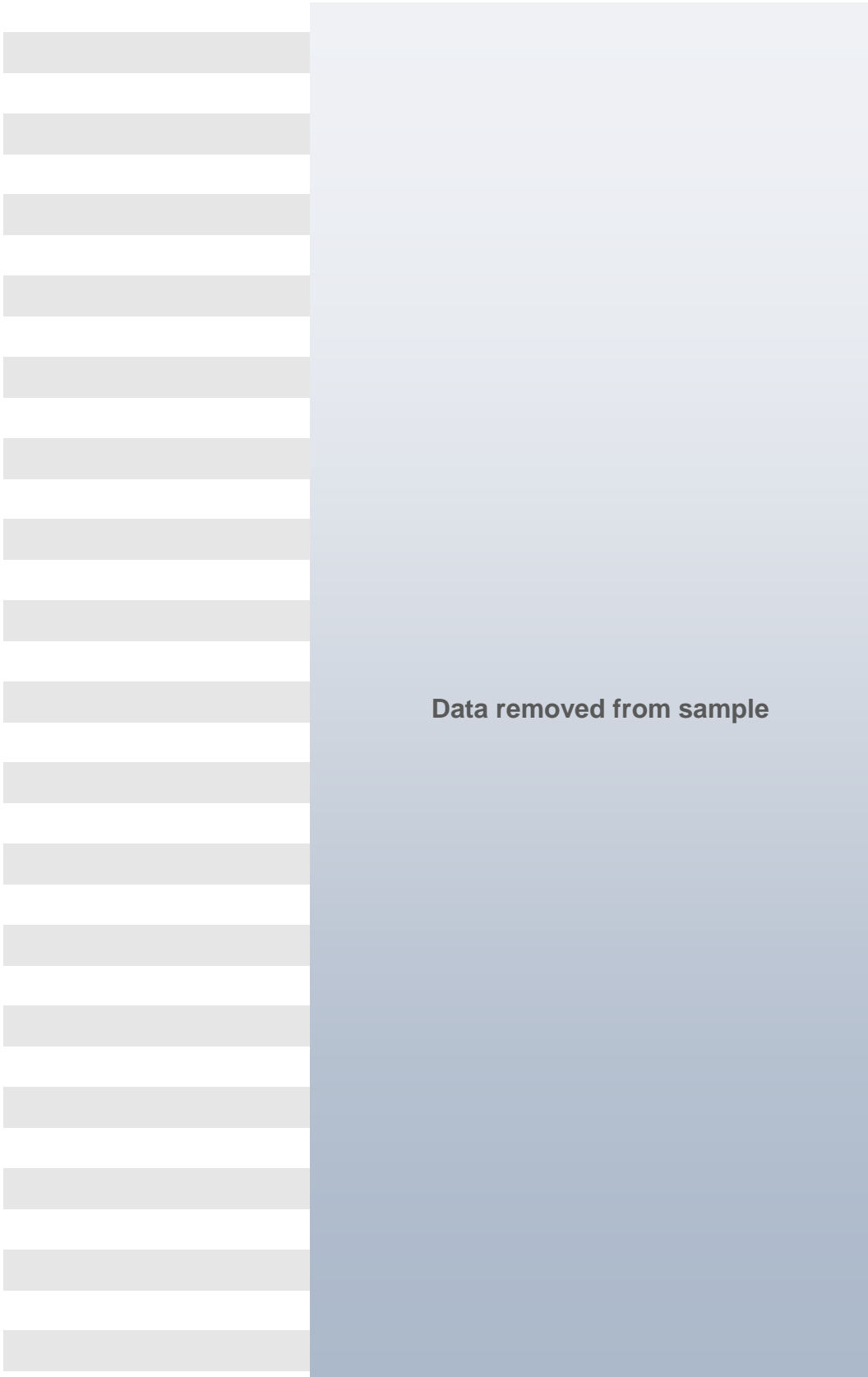
Sources used during the research included the following:

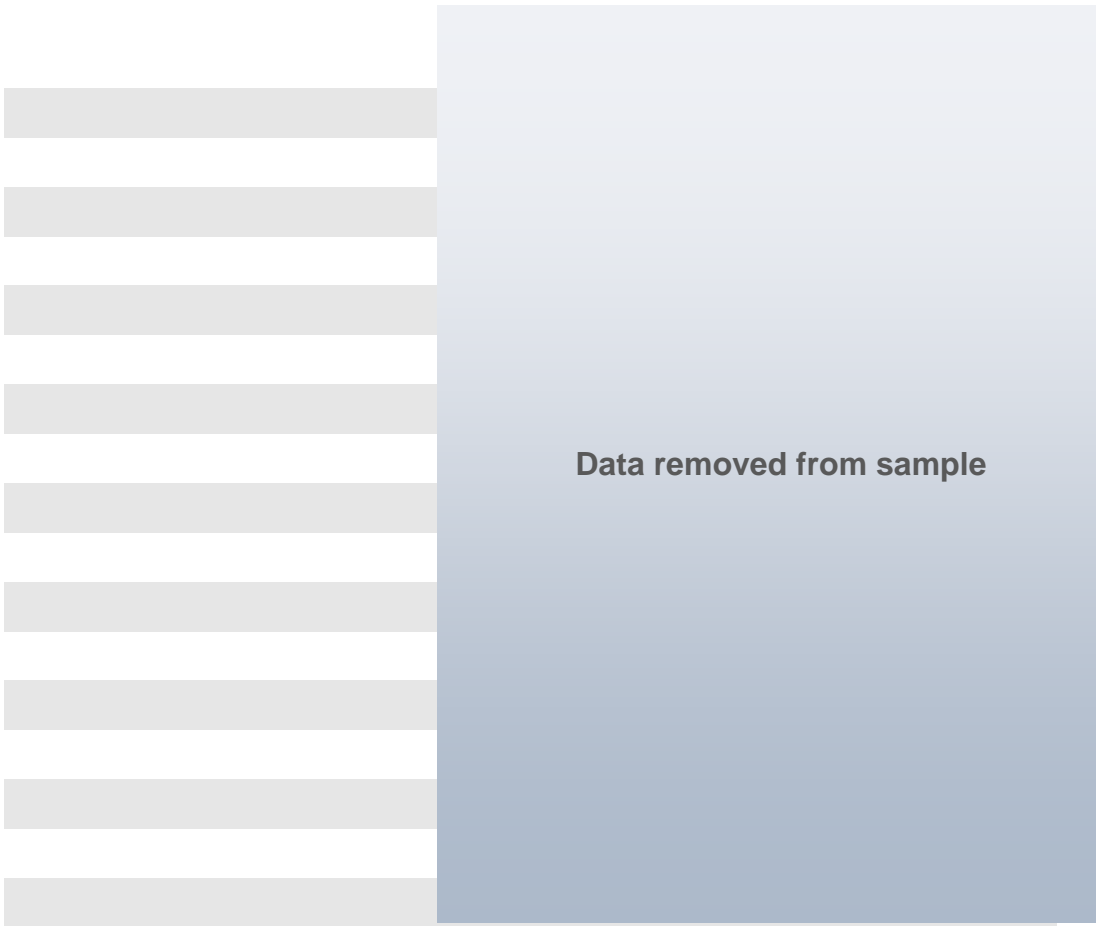
Summary 1 Research Sources

Official Sources	Data removed from sample
Trade Associations	

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Source: Euromonitor International

EXPERIENTIAL LUXURY IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Decline in tourism causes experiential luxury to see A fall in demand

Luxury hospitality (accommodation and food activities) has been one of the areas most significantly affected by lockdowns, travel bans and restrictions throughout the COVID-19

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Restrictions prevent domestic consumers from spending on experiences

Furthermore, the pandemic meant that domestic consumers were confined to their homes for

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PROSPECTS AND OPPORTUNITIES

Hotels sees opportunity in new experiences to appeal to domestic travellers

Due to the continued challenges to international travel, London hotels continue to see

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Interesting dining opportunities continue to appeal to consumers

While fine dining saw a strong negative impact from outlet closures and the contraction of

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Addressing the demand for meaningful leisure

One area which both luxury hotels and luxury foodservice could explore is the increasing

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CATEGORY DATA

Table 9 Sales of Experiential Luxury by Category: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
Luxury Foodservice	Data removed from sample					
Luxury Hotels						
Experiential Luxury						

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

Table 10 Sales of Experiential Luxury by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Luxury Foodservice	Data removed from sample		
Luxury Hotels			
Experiential Luxury			

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

Table 11 NBO Company Shares of Experiential Luxury: % Value 2016-2020

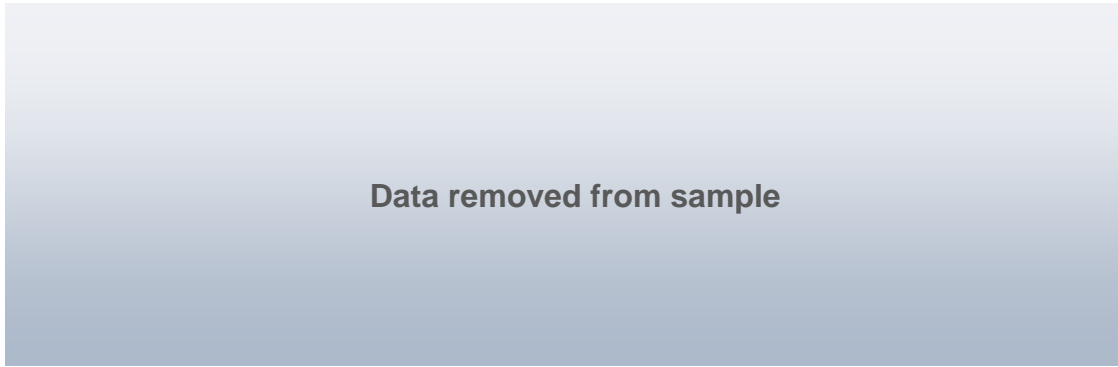
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Experiential Luxury: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------

Data removed from sample



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

Table 13 Forecast Sales of Experiential Luxury by Category: Value 2021-2026

GBP million	2021	2022	2023	2024	2025	2026
Luxury Foodservice	Data removed from sample					
Luxury Hotels						
Experiential Luxury						

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

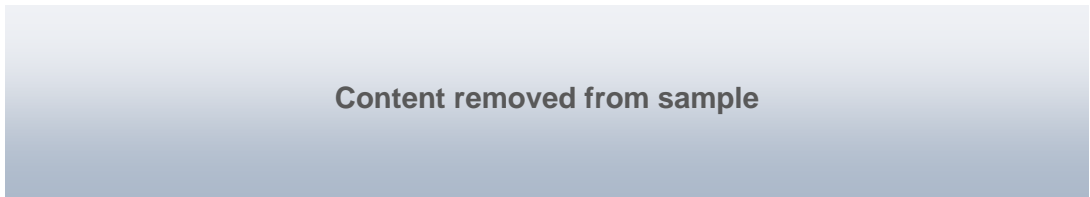
Table 14 Forecast Sales of Experiential Luxury by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Luxury Foodservice	Data removed from sample		
Luxury Hotels			
Experiential Luxury			

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

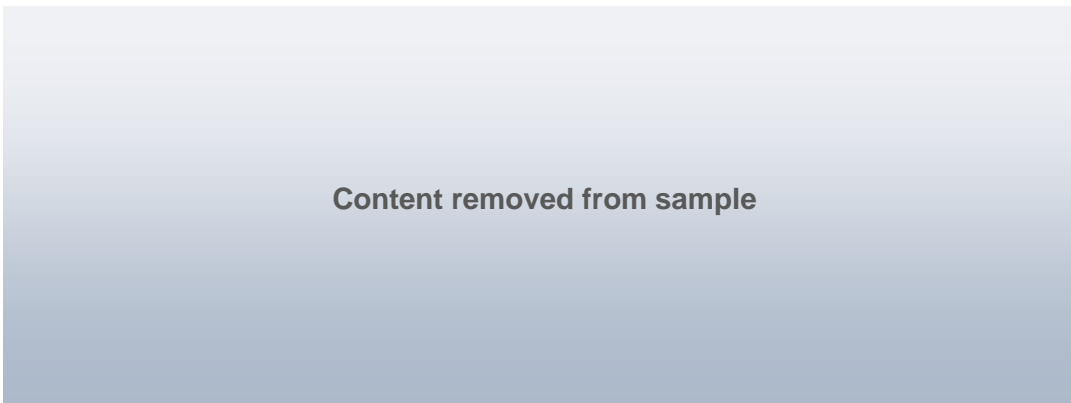
LUXURY FOODSERVICE IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

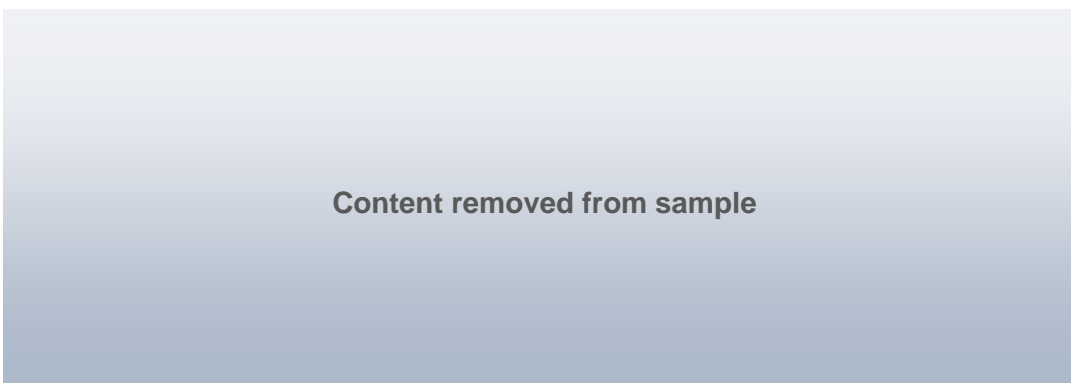


2021 DEVELOPMENTS

Luxury foodservice continues to suffer from pandemic lifestyle disruptions



Decrease in international tourism has the most pronounced impact



Luxury foodservice landscape sees A shakeout

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PROSPECTS AND OPPORTUNITIES

Luxury foodservice expected to see growth over the forecast period

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Millennials and gen Z will continue to seek out food experiences

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CATEGORY DATA

Table 15 Sales in Luxury Foodservice: Value 2016-2021

GBP million

	2016	2017	2018	2019	2020	2021
Luxury Foodservice	Data removed from sample					

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

Table 16 Sales in Luxury Foodservice: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Luxury Foodservice	Data removed from sample		

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

Table 17 NBO Company Shares in Luxury Foodservice: % Value 2016-2020

% retail value rsp

Company	2016	2017	2018	2019	2020
	Data removed from sample				

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

Table 18 LBN Brand Shares in Luxury Foodservice: % Value 2017-2020

Data removed from sample

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

Table 19 Forecast Sales in Luxury Foodservice: Value 2021-2026

GBP million

2021 2022 2023 2024 2025 2026

Luxury Foodservice

Data removed from sample

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

Table 20 Forecast Sales in Luxury Foodservice: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

Luxury Foodservice

Data removed from sample

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

LUXURY HOTELS IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

A brighter outlook for luxury hotels, despite lingering uncertainty

Luxury hotels was notably affected by lockdowns and government restrictions during the

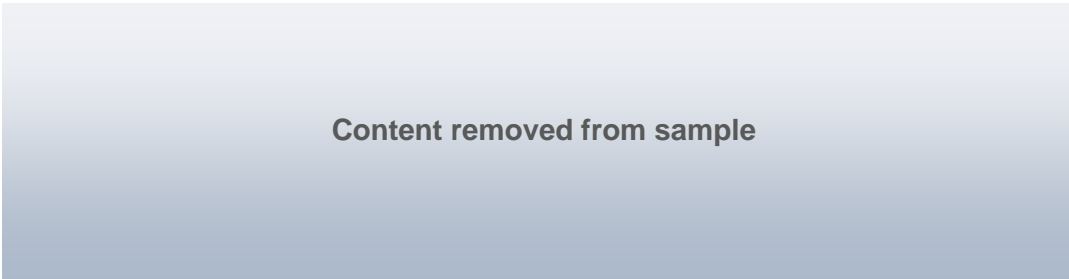
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Easing of restrictions allows for staycations and short haul leisure

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UK luxury hotels to undergo concentration

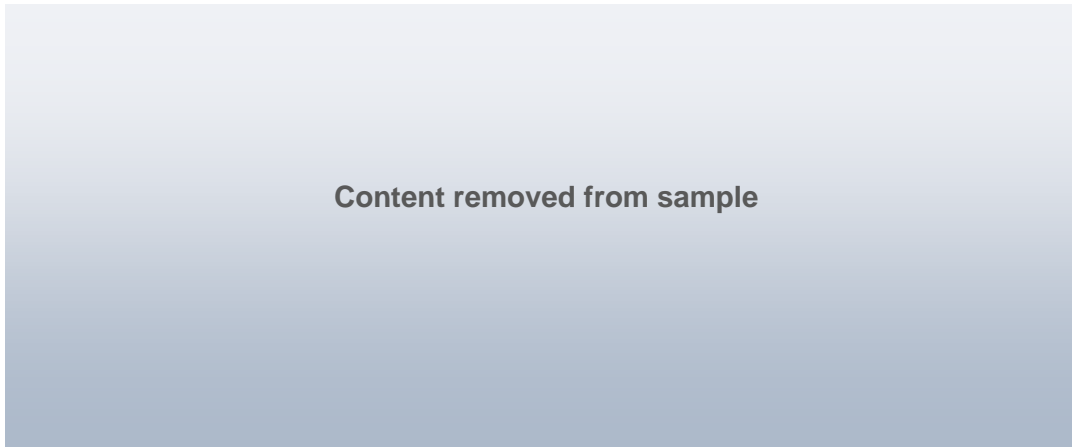
Despite an incredibly difficult year for the hotel business, Marriott International Inc maintained



PROSPECTS AND OPPORTUNITIES

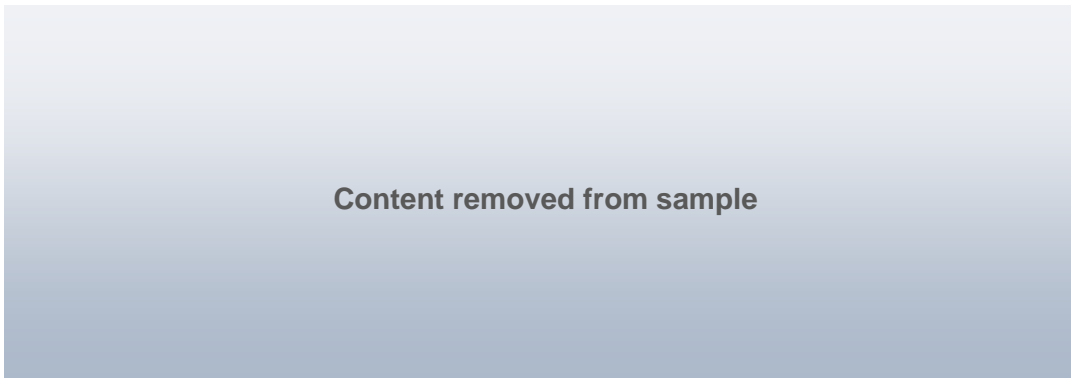
Recovery to pre-COVID-19 levels will be slow

Luxury hotels is expected to experience a slow return to the pre-pandemic level of sales



Appealing to the consumer shift in life priorities will help drive growth

The pandemic has allowed consumers to take time to reconsider their life priorities for when



CATEGORY DATA

Table 21 Sales in Luxury Hotels: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
Luxury Hotels	Data removed from sample					

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

Table 22 Sales in Luxury Hotels: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Luxury Hotels	Data removed from sample		

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

Table 23 NBO Company Shares in Luxury Hotels: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
Data removed from sample					

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

Table 24 LBN Brand Shares in Luxury Hotels: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

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

Table 25 Forecast Sales in Luxury Hotels: Value 2021-2026

GBP million	2021	2022	2023	2024	2025	2026
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Luxury Hotels

Data removed from sample

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

Table 26 Forecast Sales in Luxury Hotels: % Value Growth 2021-2026

% constant value growth

2021/2022

2021-26 CAGR

2021/26 Total

Luxury Hotels

Data removed from sample

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

FINE WINES/CHAMPAGNE AND SPIRITS IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

New distribution strategies and the power of e-commerce

Prior to the pandemic, consumers were already trading up to more expensive products in

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The cocktails trend propels the launch of new products in different categories

With consumers spending more time at home, cocktails became a more popular alternative. Even though this played in favour of different alcoholic drinks, rum was the main winner. The

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Lockdowns positively impact most luxury alcoholic drinks

With consumers spending more time secluded at home and not being able to travel abroad during the pandemic, many people have managed to maintain an equilibrium in their financial

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PROSPECTS AND OPPORTUNITIES

Increases for luxury rum, Irish whisky and tequila vital to luxury alcoholic drinks

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Limited editions, smaller bottles and new ingredients to shape product development

In order to attract new consumers to the luxury segment, brands are likely to develop different

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Move to e-commerce likely to be A lasting trend

The spike in sales of fine wines/champagne and spirits via e-commerce in 2020 and 2021 will

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CATEGORY DATA

Table 27 Sales of Fine Wines/Champagne and Spirits by Category: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
Fine Wines	Data removed from sample					
- Fine Champagne						
- Other Fine Wine						
Luxury Spirits						
- Luxury Brandy and Cognac						
- Luxury Whiskies						
- Other Luxury Spirits						
Fine Wines/Champagne and Spirits						

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

Table 28 Sales of Fine Wines/Champagne and Spirits by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Fine Wines	Data removed from sample		
- Fine Champagne			
- Other Fine Wine			
Luxury Spirits			
- Luxury Brandy and Cognac			
- Luxury Whiskies			
- Other Luxury Spirits			
Fine Wines/Champagne and Spirits			

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

Table 29 NBO Company Shares of Fine Wines/Champagne and Spirits: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
Data removed from sample					

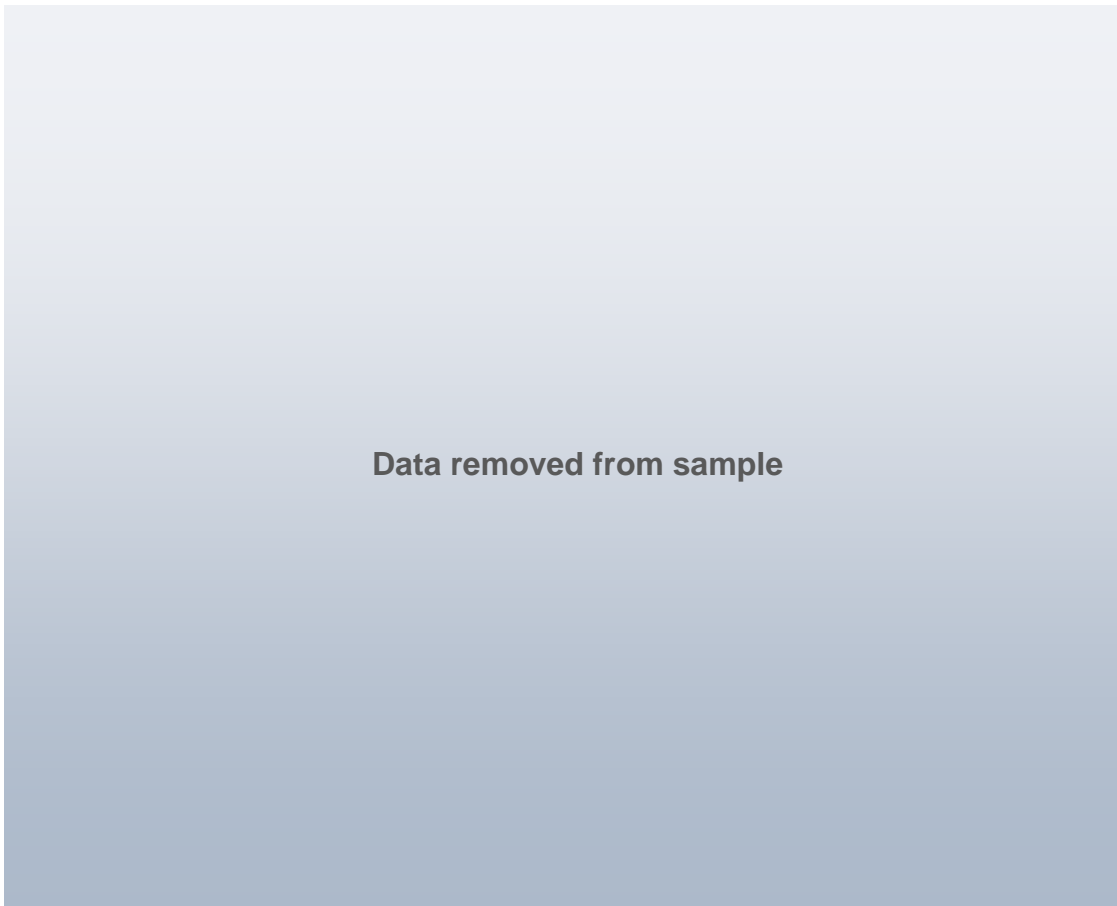
Data removed from sample

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

Table 30 LBN Brand Shares of Fine Wines/Champagne and Spirits: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample



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

Table 31 **Distribution of Fine Wines/Champagne and Spirits by Format: % Value 2016-2021**

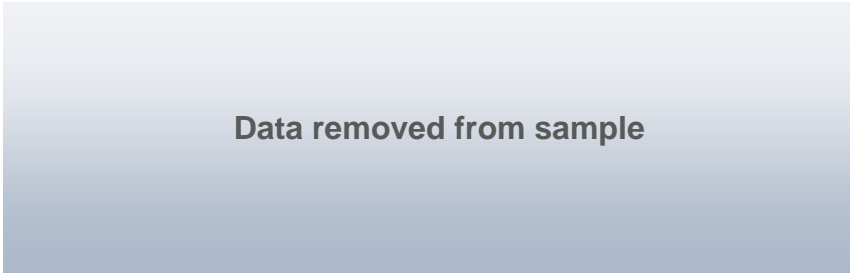
% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
- Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- E-Commerce						
Total						

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

Table 32 **Forecast Sales of Fine Wines/Champagne and Spirits by Category: Value 2021-2026**

GBP million	2021	2022	2023	2024	2025	2026

- Fine Wines
- Fine Champagne
- Other Fine Wine
- Luxury Spirits
- Luxury Brandy and Cognac
- Luxury Whiskies
- Other Luxury Spirits
- Fine Wines/Champagne and Spirits



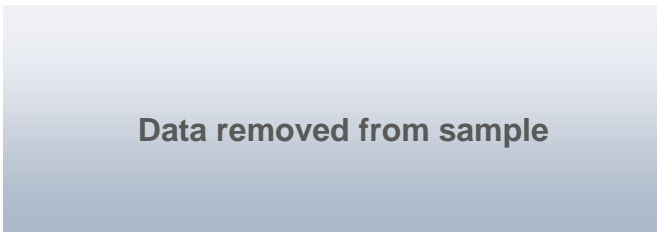
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 33 Forecast Sales of Fine Wines/Champagne and Spirits by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Fine Wines
- Fine Champagne
- Other Fine Wine
- Luxury Spirits
- Luxury Brandy and Cognac
- Luxury Whiskies
- Other Luxury Spirits
- Fine Wines/Champagne and Spirits



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

PREMIUM AND LUXURY CARS IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Premium and luxury cars remains resilient despite disruption from COVID-19

The wider automotive industry, including premium and luxury cars, was severely impacted by the COVID-19 pandemic in 2020 and 2021. The pandemic pushed UK car sales down to the

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The exit from Europe creates opportunity and uncertainty in premium and luxury cars

After the trade agreement in January 2021, the UK is officially out of Europe. Before Brexit, Britain had become one of Europe's most productive car makers, and by making it harder to

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Electric and hybrid vehicles see an uptick in demand

Electric and hybrid vehicles are continuing their strong performances, as premium and luxury car manufacturers continue to expand their options as they advance their environmental

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PROSPECTS AND OPPORTUNITIES

The growing importance of online channels

The demand for automotive technology continues to evolve in 2021, and consumers have greater access to innovations. The pace of change will continue to accelerate in all areas,

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CATEGORY DATA

Table 34 Sales of Premium and Luxury Cars: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
Premium and Luxury Cars	Data removed from sample					

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

Table 35 Sales of Premium and Luxury Cars: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Premium and Luxury Cars	Data removed from sample		

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

Table 36 NBO Company Shares of Premium and Luxury Cars: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
	Data removed from sample				

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

Table 37 LBN Brand Shares of Premium and Luxury Cars: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

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

Table 38 Forecast Sales of Premium and Luxury Cars: Value 2021-2026

GBP million	2021	2022	2023	2024	2025	2026
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Premium and Luxury Cars **Data removed from sample**

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

Table 39 Forecast Sales of Premium and Luxury Cars: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
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Premium and Luxury Car **Data removed from sample**

PERSONAL LUXURY IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Consumers still prioritise luxury to celebrate life post-COVID-19

Personal luxury suffered in 2020 due to the lifestyle disruptions caused by COVID-19

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Digital brand experience becomes A crucial attribute

The pandemic accelerated trends that were already occurring prior to the health crisis, such

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Consumers look to protect the planet and society by buying responsibly

The pandemic also caused shifts in consumer behaviour, due to health, social, political and environmental upheaval and the Black Lives Matter Movement, which was highlighted as a

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PROSPECTS AND OPPORTUNITIES

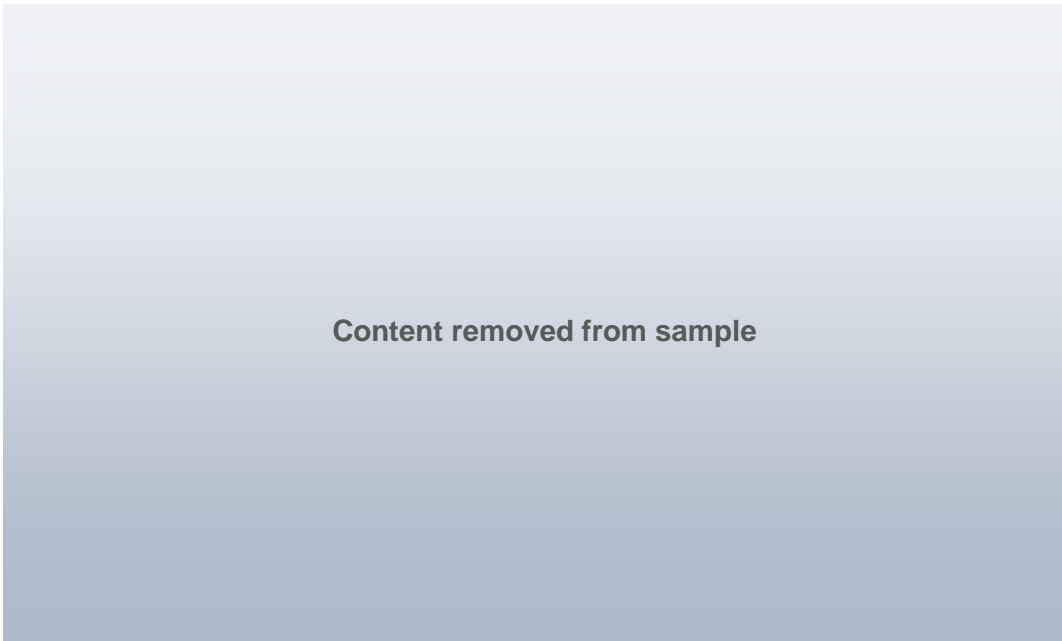
In the “new normal”, consumers want online and offline integration

The pandemic led many consumers to move their purchases to online channels in most

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Luxury resale and eco efforts will continue to ramp up

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CATEGORY DATA

Table 40 Sales of Personal Luxury by Category: Value 2016-2021

GBP million

	2016	2017	2018	2019	2020	2021
Designer Apparel and Footwear (Ready-to-Wear)	Data removed from sample					
Luxury Eyewear						
Luxury Jewellery						
Luxury Leather Goods						
Luxury Portable Consumer Electronics						
Luxury Timepieces						
Luxury Writing Instruments and Stationery						
Super Premium Beauty and Personal Care						
Personal Luxury						

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

Table 41 Sales of Personal Luxury by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Designer Apparel and Footwear (Ready-to-Wear)	Data removed from sample		
Luxury Eyewear			
Luxury Jewellery			

Luxury Leather Goods
 Luxury Portable Consumer Electronics
 Luxury Timepieces
 Luxury Writing Instruments and Stationery
 Super Premium Beauty and Personal Care
 Personal Luxury

Data removed from sample

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

Table 42 NBO Company Shares of Personal Luxury: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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Data removed from sample

Data removed from sample

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

Table 43 LBN Brand Shares of Personal Luxury: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Data removed from sample

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

Table 44 Distribution of Personal Luxury by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
- Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- E-Commerce						
Total						

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

Table 45 Forecast Sales of Personal Luxury by Category: Value 2021-2026

GBP million	2021	2022	2023	2024	2025	2026
Designer Apparel and Footwear (Ready-to-Wear)	Data removed from sample					
Luxury Eyewear						
Luxury Jewellery						
Luxury Leather Goods						
Luxury Portable Consumer Electronics						
Luxury Timepieces						
Luxury Writing Instruments and Stationery						
Super Premium Beauty and Personal Care						
Personal Luxury						

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

Table 46 Forecast Sales of Personal Luxury by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Designer Apparel and Footwear (Ready-to-Wear)	Data removed from sample		
Luxury Eyewear			
Luxury Jewellery			
Luxury Leather Goods			
Luxury Portable Consumer Electronics			
Luxury Timepieces			
Luxury Writing Instruments and Stationery			
Super Premium Beauty and Personal Care			
Personal Luxury			

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

DESIGNER APPAREL AND FOOTWEAR (READY-TO-WEAR) IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

Designer apparel and footwear starts its recovery

In 2020, designer apparel and footwear was tremendously negatively affected by the COVID-

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Distinctive brands continue to sparkle

During the pandemic, most consumers who were confined to their homes for much of the year sought out comfortable and adaptable fashion items, such as cashmere loungewear, and

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PROSPECTS AND OPPORTUNITIES

Shift to e-commerce is here to stay

One reason for the resilience of luxury fashion is that there is a greater proportion of spending happening through digital channels, as new clients started buying luxury goods online for the



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Growth of conscious luxury reveals that brand purpose and values are chic

The lifestyle disruptions caused by the pandemic led many luxury consumers to pause and reflect on their values and life priorities, with many people concluding that they want to consume



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CATEGORY DATA

Table 47 Sales of Designer Apparel and Footwear (Ready-to-Wear) by Category: Value 2016-2021

GBP million

	2016	2017	2018	2019	2020	2021
- Designer Apparel (Ready-to-Wear)	Data removed from sample					
-- Men's Designer Apparel						
-- Women's Designer Apparel						
-- Designer Childrenswear						
-- Designer Clothing Accessories and Hosiery						
- Designer Footwear						
-- Children's Designer Footwear						
-- Men's Designer Footwear						
-- Women's Designer Footwear						
Designer Apparel and Footwear (Ready-to-Wear)						

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

Table 48 Sales of Designer Apparel and Footwear (Ready-to-Wear) by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
- Designer Apparel (Ready-to-Wear)	Data removed from sample		
-- Men's Designer Apparel			
-- Women's Designer Apparel			
-- Designer Childrenswear			
-- Designer Clothing Accessories and Hosiery			
- Designer Footwear			
-- Children's Designer Footwear			
-- Men's Designer Footwear			
-- Women's Designer Footwear			
Designer Apparel and Footwear (Ready-to-Wear)			

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

Table 49 NBO Company Shares of Designer Apparel and Footwear (Ready-to-Wear): % Value 2016-2020

% retail value rsp

Company	2016	2017	2018	2019	2020
	Data removed from sample				

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

Table 50 LBN Brand Shares of Designer Apparel and Footwear (Ready-to-Wear): % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
		Data removed from sample			



Data removed from sample



Data removed from sample

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

Table 51 Distribution of Designer Apparel and Footwear (Ready-to-Wear) by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
- Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- E-Commerce						
Total						

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

Table 52 Forecast Sales of Designer Apparel and Footwear (Ready-to-Wear) by Category: Value 2021-2026

GBP million	2021	2022	2023	2024	2025	2026
- Designer Apparel (Ready-to-Wear)	Data removed from sample					
-- Men's Designer Apparel						
-- Women's Designer Apparel						
-- Designer Childrenswear						
-- Designer Clothing Accessories and Hosiery						
- Designer Footwear						
-- Children's Designer Footwear						
-- Men's Designer Footwear						
-- Women's Designer Footwear						
Designer Apparel and Footwear (Ready-to-Wear)						

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

Table 53 Forecast Sales of Designer Apparel and Footwear (Ready-to-Wear) by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
- Designer Apparel (Ready-to-Wear)	Data removed from sample		
-- Men's Designer Apparel			
-- Women's Designer Apparel			
-- Designer Childrenswear			
-- Designer Clothing Accessories and Hosiery			

- Designer Footwear
 - Children's Designer Footwear
 - Men's Designer Footwear
 - Women's Designer Footwear
- Designer Apparel and Footwear (Ready-to-Wear)

Data removed from sample

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

LUXURY EYEWEAR IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Start of rebound in luxury eyewear in 2021 as restrictions ease

COVID-19 had a significant negative impact on eyewear as a whole in 2020, particularly with

Content removed from sample

Recovery in the second half of 2021

After a poor start to the year, by the second quarter of 2021 sales of eyewear started to

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Luxottica Group maintains its leadership

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PROSPECTS AND OPPORTUNITIES

Eye health and the desire for luxury fuels A positive forecast for luxury eyewear

In 2021, increasing levels of myopia and the changing cultural perspective on wearing

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Young consumers will drive growth of luxury eyewear

The growth of luxury eyewear will continue to depend largely on millennials and gen Z. Even prior to the pandemic, young consumers were gravitating to luxury eyewear brands with a strong

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E-commerce channel set to remain strong

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CATEGORY DATA

Table 54 Sales of Luxury Eyewear by Category: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
- Luxury Spectacle Frames	Data removed from sample					
- Luxury Sun Glasses						
-- Men's Luxury Sun Glasses						
-- Women's Luxury Sun Glasses						
Luxury Eyewear						

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

Table 55 Sales of Luxury Eyewear by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Luxury Spectacle Frames	Data removed from sample		
- Luxury Sun Glasses			
-- Men's Luxury Sun Glasses			
-- Women's Luxury Sun Glasses			
Luxury Eyewear			

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

Table 56 NBO Company Shares of Luxury Eyewear: % Value 2016-2020

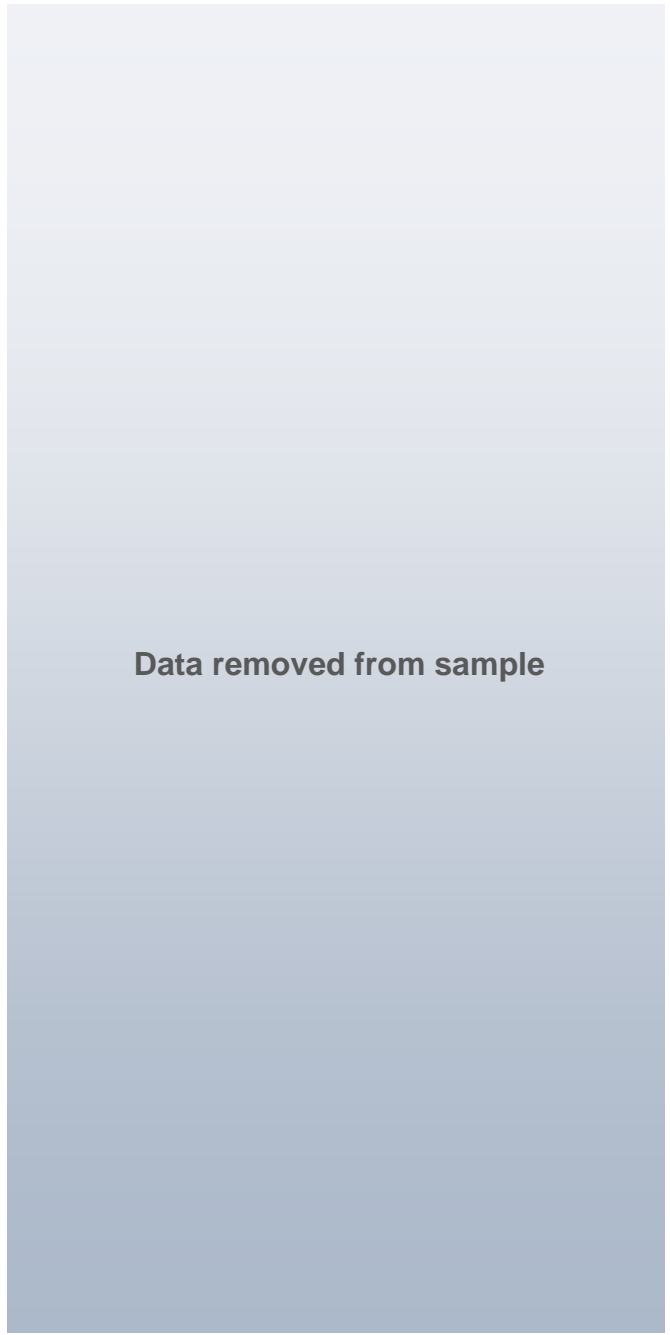
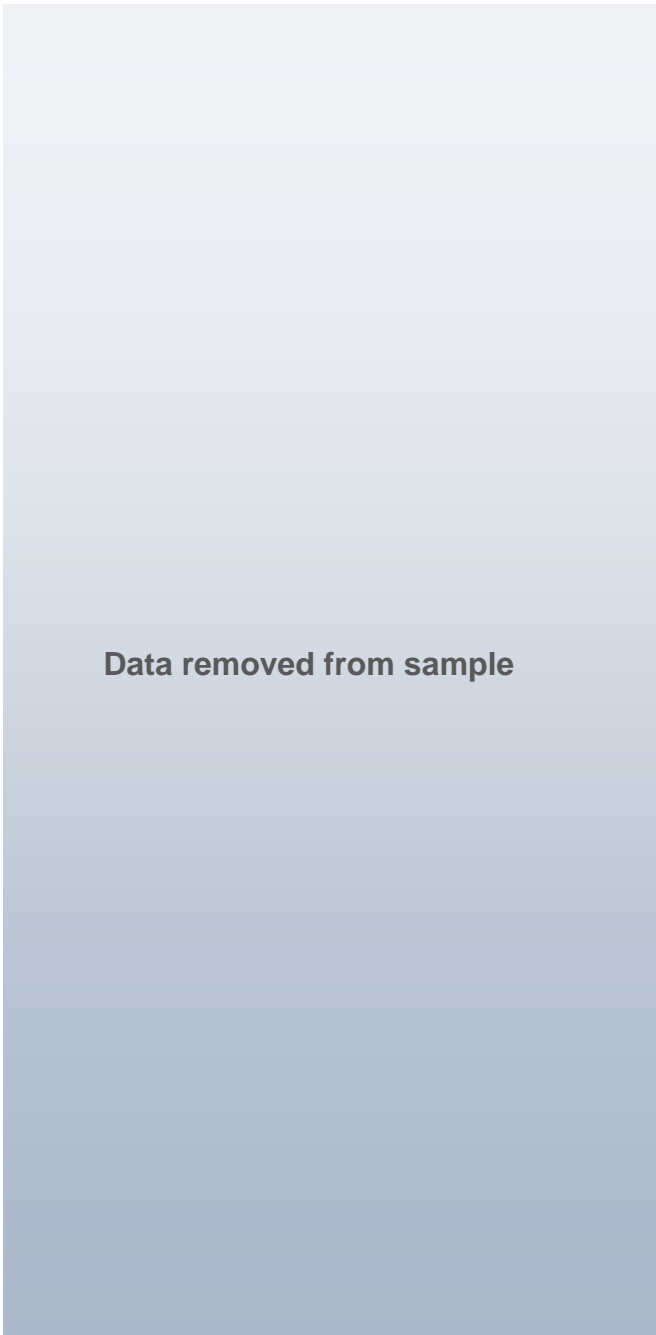
% retail value rsp Company	2016	2017	2018	2019	2020
Data removed from sample					

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

Table 57 LBN Brand Shares of Luxury Eyewear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample



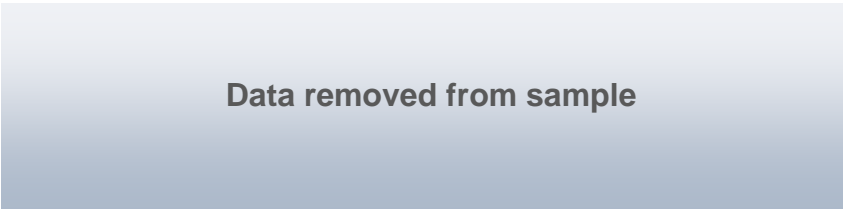
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 Forecast Sales of Luxury Eyewear by Category: Value 2021-2026

GBP million

	2021	2022	2023	2024	2025	2026
- Luxury Spectacle Frames	Data removed from sample					
- Luxury Sun Glasses						

- Men's Luxury Sun Glasses
- Women's Luxury Sun Glasses
- Luxury Eyewear



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

Table 60 Forecast Sales of Luxury Eyewear by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Luxury Spectacle Frames
- Luxury Sun Glasses
- Men's Luxury Sun Glasses
- Women's Luxury Sun Glasses
- Luxury Eyewear



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

LUXURY JEWELLERY IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Luxury jewellery sees signs of recovery

Luxury jewellery saw a significant sales decline in 2020 as a result of the COVID-19

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Strong heritage brands are more resilient

Heritage brands such as LVMH's Tiffany & Co and Richemont's Cartier saw impressive

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E-commerce helps to bolster sales of luxury jewellery

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PROSPECTS AND OPPORTUNITIES

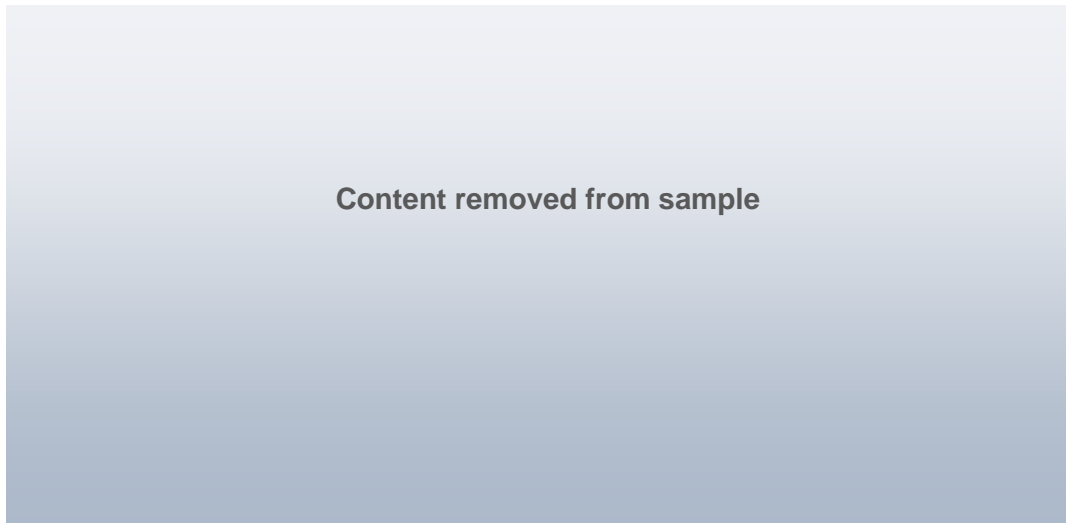
Luxury jewellery appeals to the consumer demand for environment-friendliness

Many consumers found their lifestyles disrupted by the pandemic, and while spending more

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Tiffany & Co revamp shows the importance of appealing to young consumers

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CATEGORY DATA

Table 61 Sales of Luxury Jewellery by Category: Value 2016-2021

GBP million

	2016	2017	2018	2019	2020	2021
- Luxury Costume Jewellery	Data removed from sample					
- Luxury Fine Jewellery						
-- Men's Luxury Fine Jewellery						
-- Women's Luxury Fine Jewellery						
Luxury Jewellery						

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

Table 62 Sales of Luxury Jewellery by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
- Luxury Costume Jewellery	Data removed from sample		
- Luxury Fine Jewellery			
-- Men's Luxury Fine Jewellery			
-- Women's Luxury Fine Jewellery			
Luxury Jewellery			

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

Table 63 NBO Company Shares of Luxury Jewellery: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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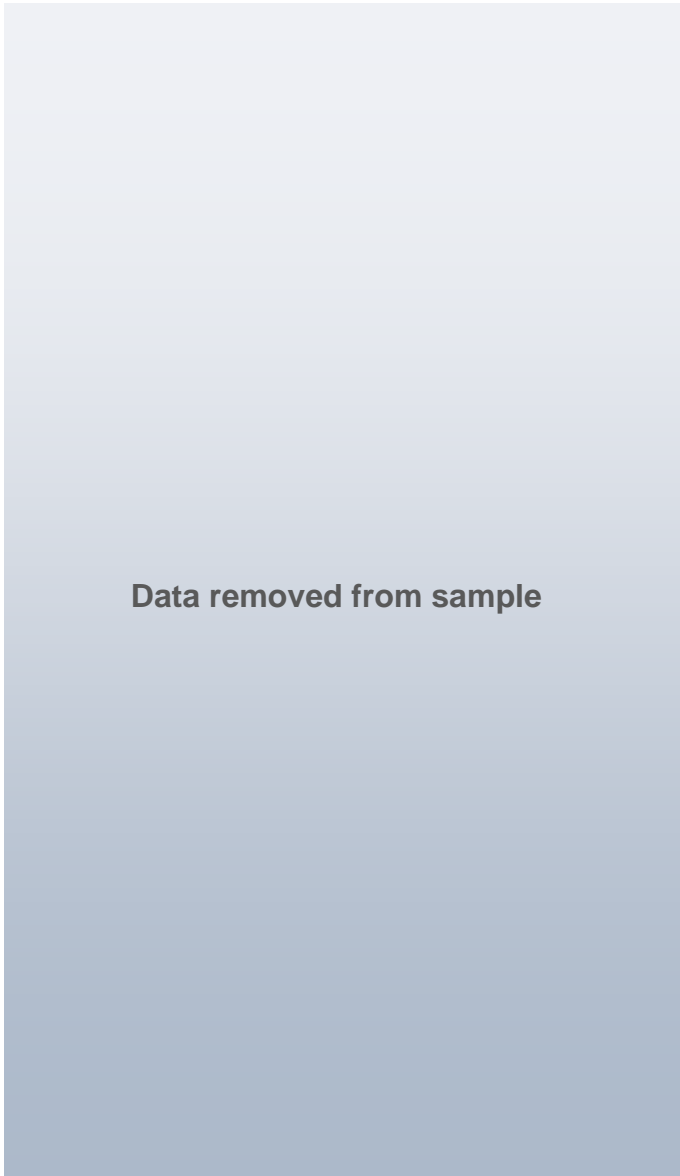
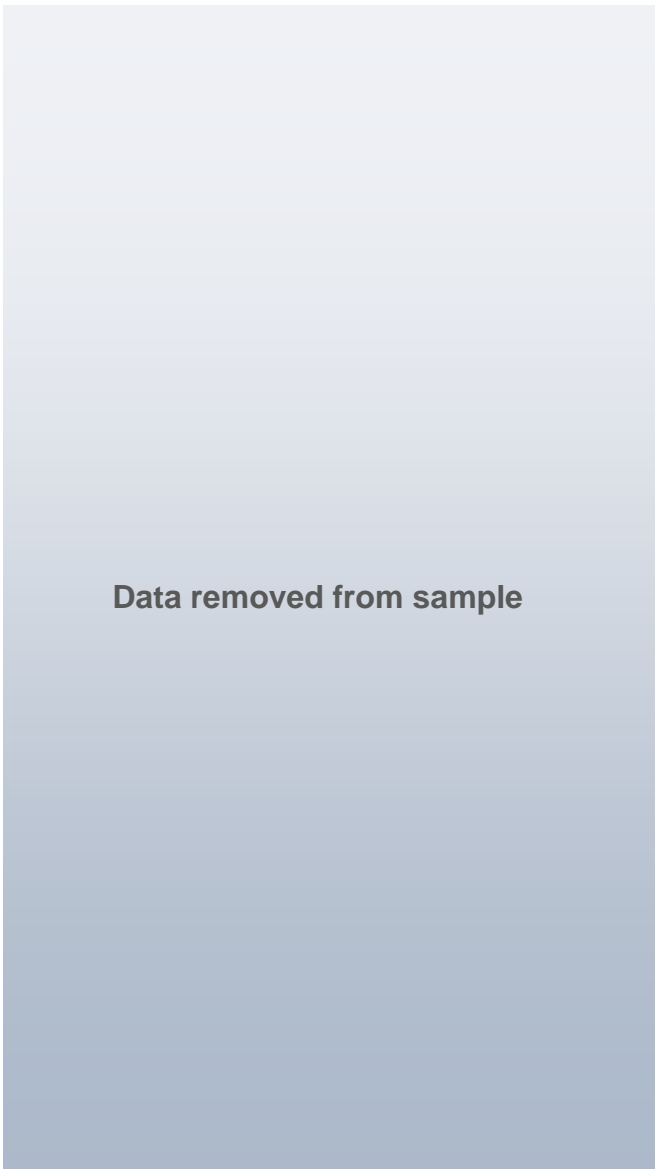
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 64 LBN Brand Shares of Luxury Jewellery: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample



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

Table 65 Distribution of Luxury Jewellery by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
- Non-Grocery Specialists						
- Mixed Retailers	Data removed from sample					
Non-Store Retailing						
- E-Commerce						
Total	Data removed from sample					

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

Table 66 Forecast Sales of Luxury Jewellery by Category: Value 2021-2026

GBP million	2021	2022	2023	2024	2025	2026
- Luxury Costume Jewellery	Data removed from sample					
- Luxury Fine Jewellery						
-- Men's Luxury Fine Jewellery						
-- Women's Luxury Fine Jewellery						
Luxury Jewellery						

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

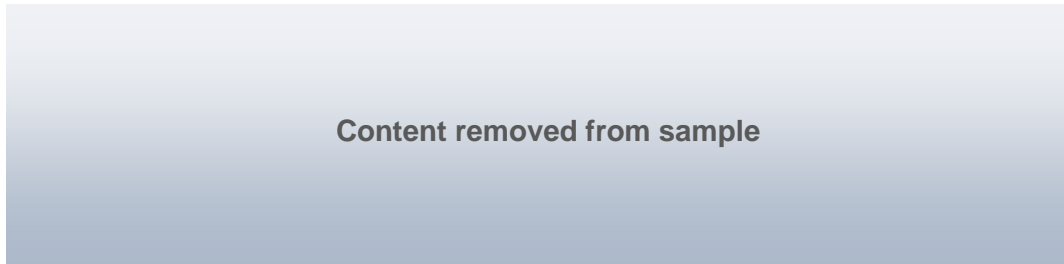
Table 67 Forecast Sales of Luxury Jewellery by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
- Luxury Costume Jewellery	Data removed from sample		
- Luxury Fine Jewellery			
-- Men's Luxury Fine Jewellery			
-- Women's Luxury Fine Jewellery			
Luxury Jewellery			

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

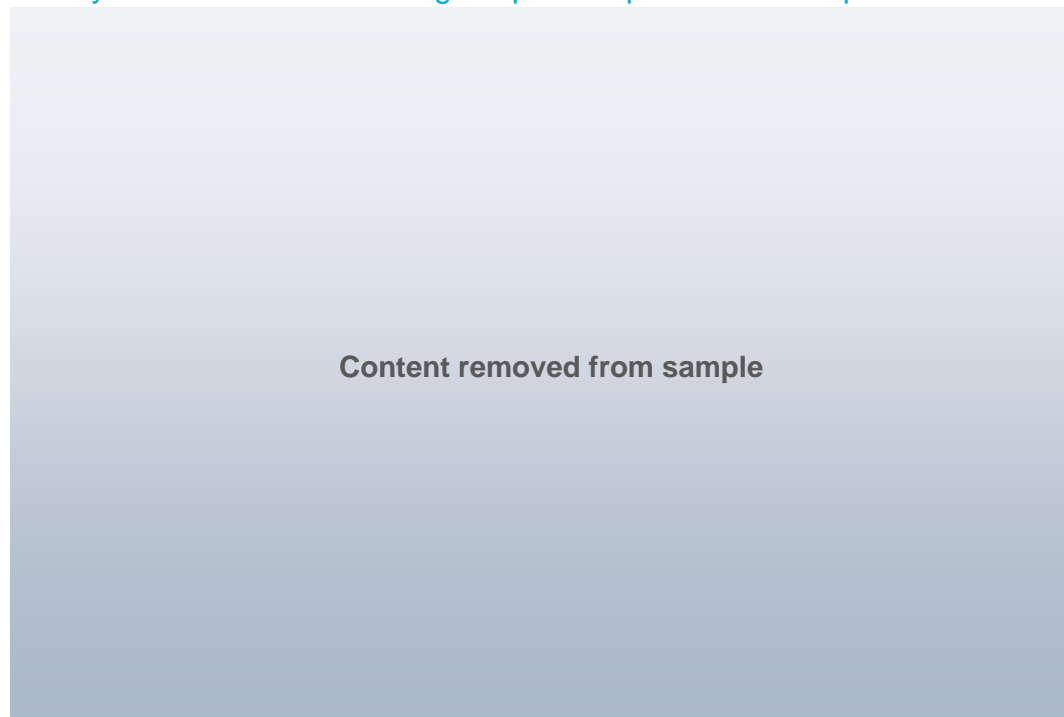
LUXURY LEATHER GOODS IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS



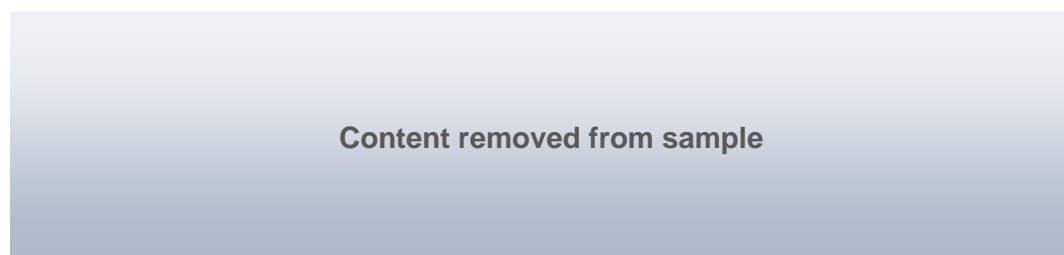
2021 DEVELOPMENTS

Luxury demand remains strong despite the pandemic disruption



Online distribution channels are increasingly significant

Before the pandemic, most purchases of luxury leather goods took place in-store, because of



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PROSPECTS AND OPPORTUNITIES

Heritage brands appeal to consumers who want to buy better

Consumers were forced to spend more time at home in 2020 and 2021 as their lives were disrupted by the lockdowns and social distancing restrictions in the UK. This extra time at home

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Resale goes from strength to strength

The COVID-19 pandemic caused lifestyle disruptions, which led many consumers to

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CATEGORY DATA

Table 68 Sales of Luxury Leather Goods: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
- Luxury Bags and Small Leather Goods	Data removed from sample					
-- Men's Luxury Bags and Small Leather Goods						
-- Women's Luxury Bags and Small Leather Goods						
- Luxury Travel Goods						
Luxury Leather Goods						

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

Table 69 Sales of Luxury Leather Goods: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Luxury Bags and Small Leather Goods	Data removed from sample		
-- Men's Luxury Bags and Small Leather Goods			
-- Women's Luxury Bags and Small Leather Goods			
- Luxury Travel Goods			
Luxury Leather Goods			

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

Table 70 NBO Company Shares of Luxury Leather Goods: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
	Data removed from sample				

Data removed from sample

Data removed from sample

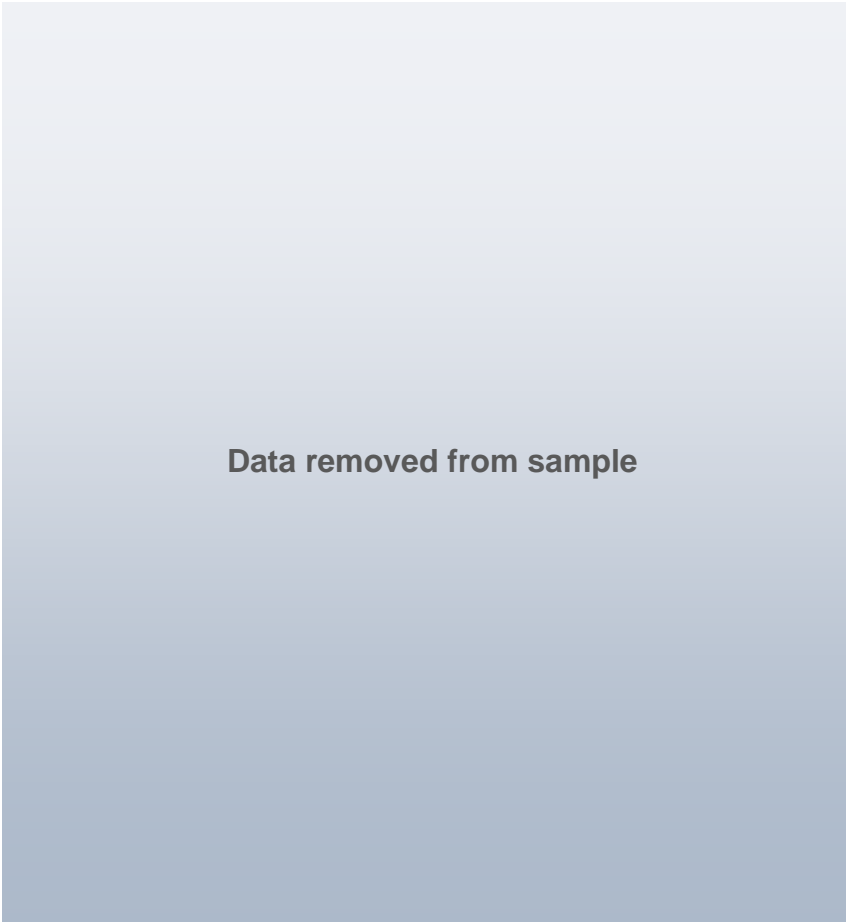
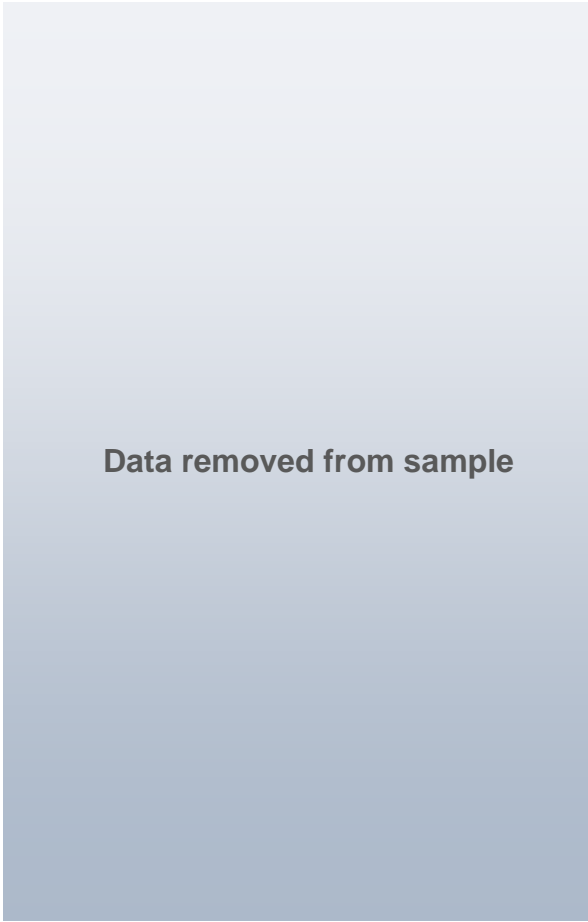
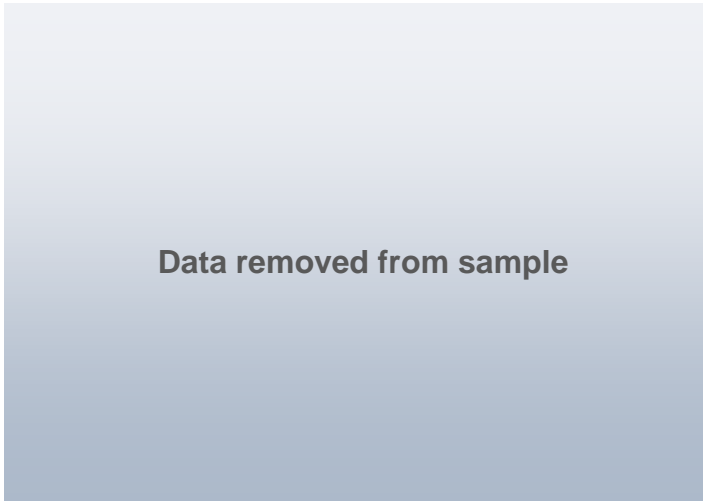
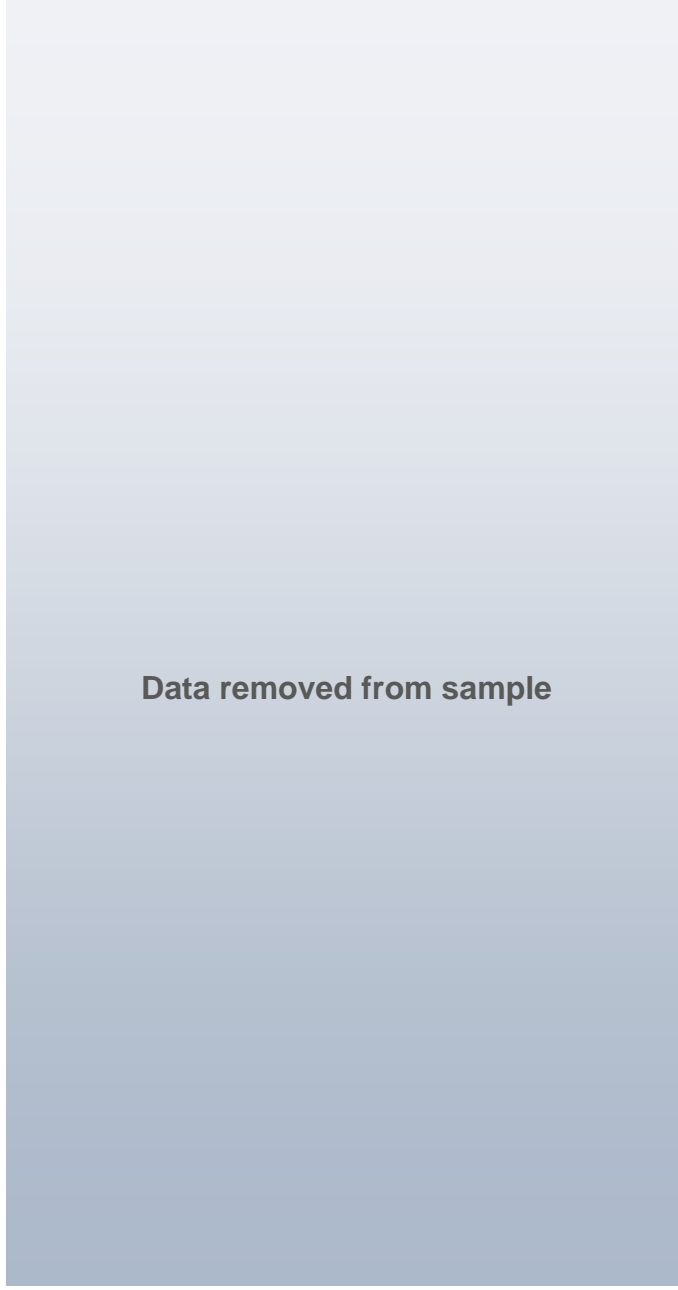
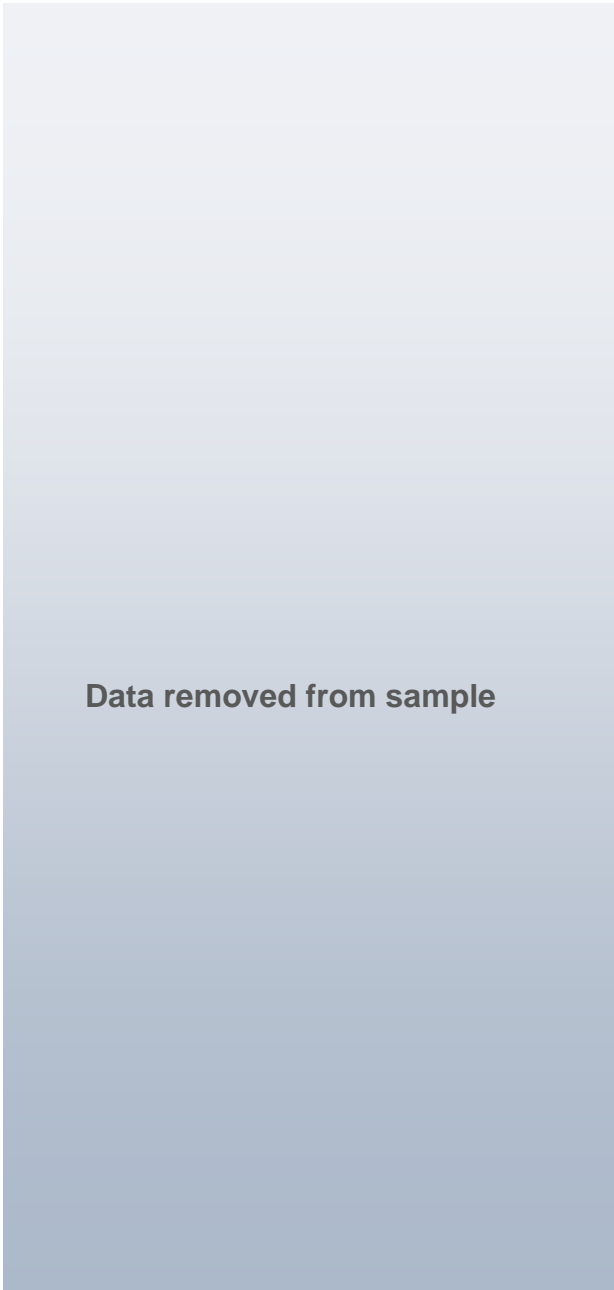


Table 71 LBN Brand Shares of Luxury Leather Goods: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 72 **Distribution of Luxury Leather Goods by Format: % Value 2016-2021**

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
- Non-Grocery Specialists						
- Mixed Retailers	Data removed from sample					
Non-Store Retailing						
- E-Commerce						
Total	Data removed from sample					

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

Table 73 Forecast Sales of Luxury Leather Goods: Value 2021-2026

GBP million

	2021	2022	2023	2024	2025	2026
- Luxury Bags and Small Leather Goods	Data removed from sample					
-- Men's Luxury Bags and Small Leather Goods						
-- Women's Luxury Bags and Small Leather Goods						
- Luxury Travel Goods						
Luxury Leather Goods						

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

Table 74 Forecast Sales of Luxury Leather Goods: % Value Growth 2021-2026

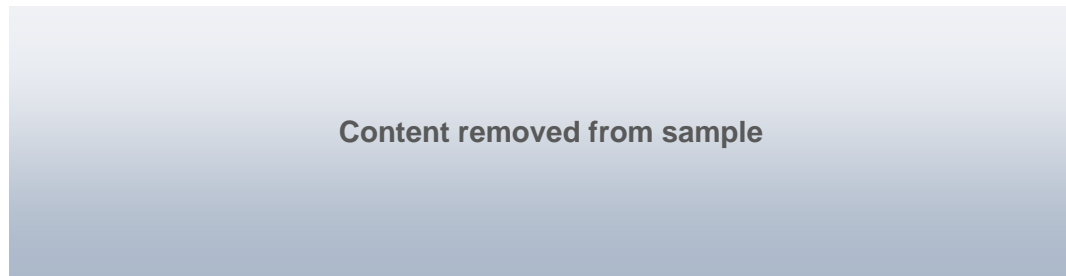
% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
- Luxury Bags and Small Leather Goods	Data removed from sample		
-- Men's Luxury Bags and Small Leather Goods			
-- Women's Luxury Bags and Small Leather Goods			
- Luxury Travel Goods			
Luxury Leather Goods			

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

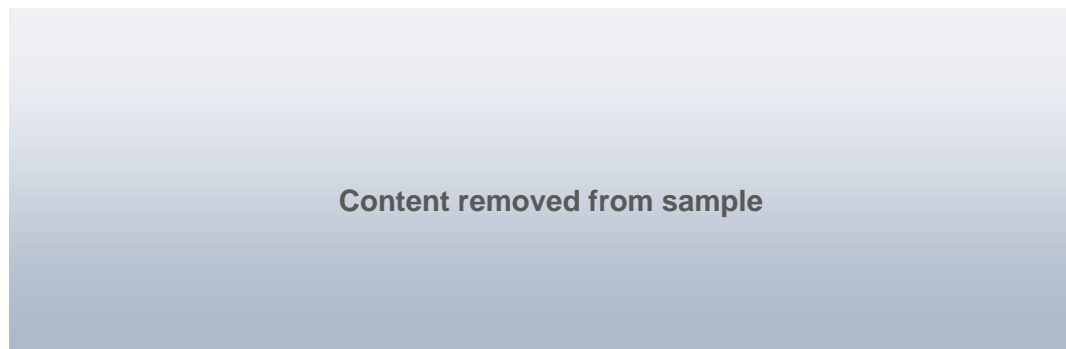
LUXURY PORTABLE CONSUMER ELECTRONICS IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

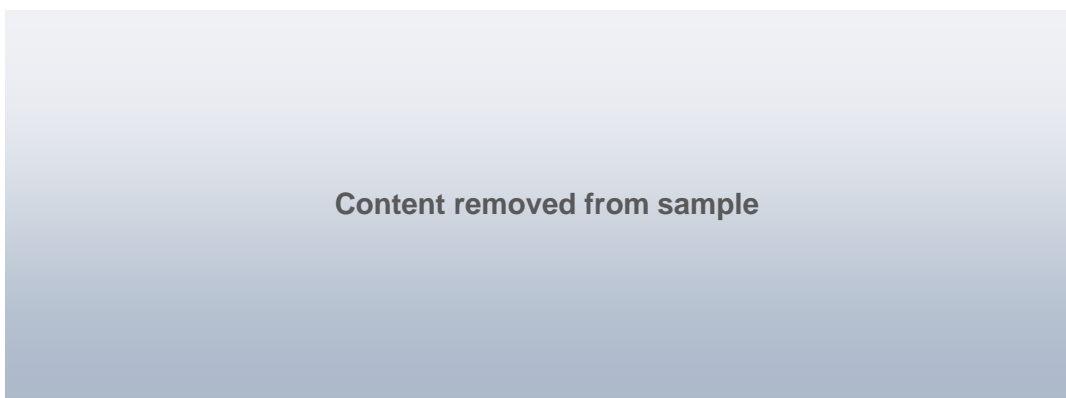


2021 DEVELOPMENTS

Luxury mobile phones declines as many players are leaving or have left the market



Outlet closures, limited international tourism and tax changes provide challenges



Retailers focus on online sales and target domestic buyers of luxury wearables

E-commerce saw dynamic growth in luxury portable consumer electronics in 2020, and this

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PROSPECTS AND OPPORTUNITIES

Focus on data protection and security A possible selling point for luxury phones

Despite a number of companies withdrawing from luxury mobile phones, a new player was

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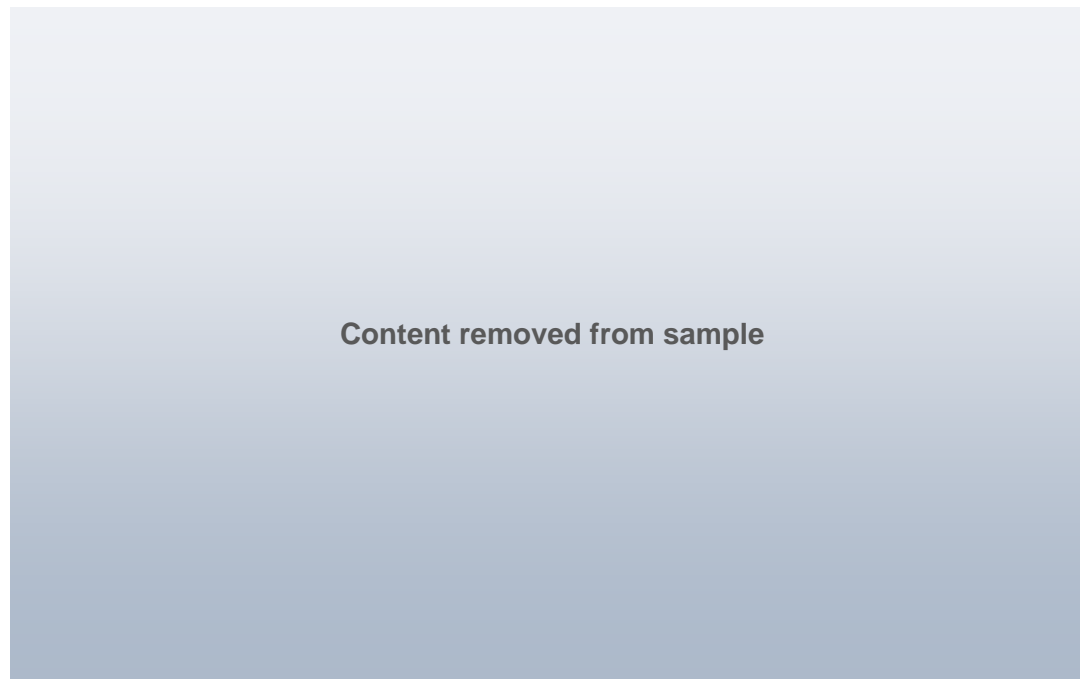
Luxury players likely to find it difficult to keep up with mass market mobile phones

Luxury mobile phones is a declining category in the UK, as there are many premium mobile

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Smartwatches will be the focus of brands, as this category is set to grow strongly

Wearables are expected to remain the focus of brands in luxury portable consumer electronics, especially as UK consumers have started paying attention to their health and are



CATEGORY DATA

Table 75 Sales of Luxury Portable Consumer Electronics by Category: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
- Luxury Mobile Phones - Luxury Wearables Luxury Portable Consumer Electronics	Data removed from sample					

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

Table 76 Sales of Luxury Portable Consumer Electronics by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Luxury Mobile Phones - Luxury Wearables Luxury Portable Consumer Electronics	Data removed from sample		

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

Table 77 NBO Company Shares of Luxury Portable Consumer Electronics: % Value
2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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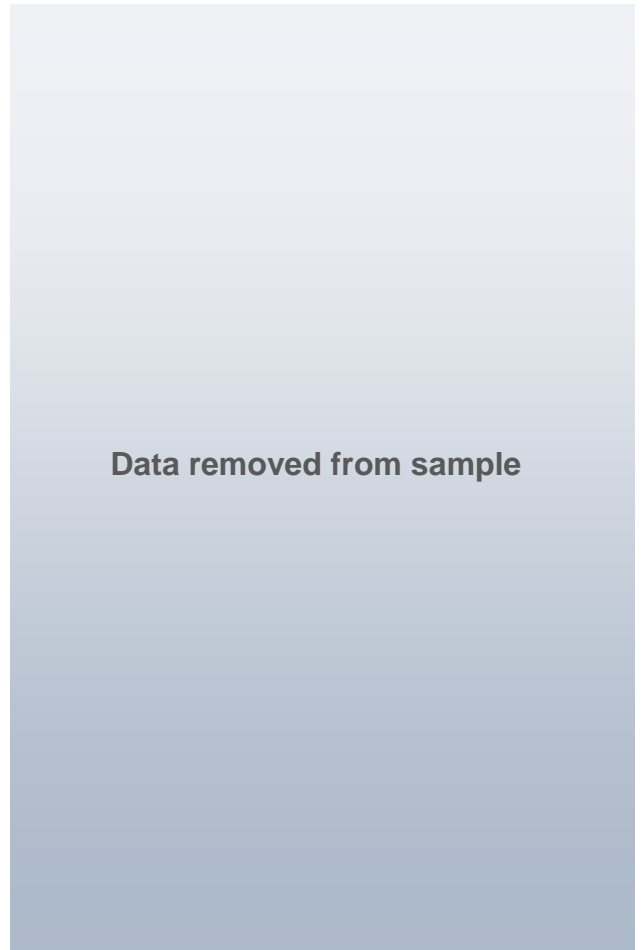
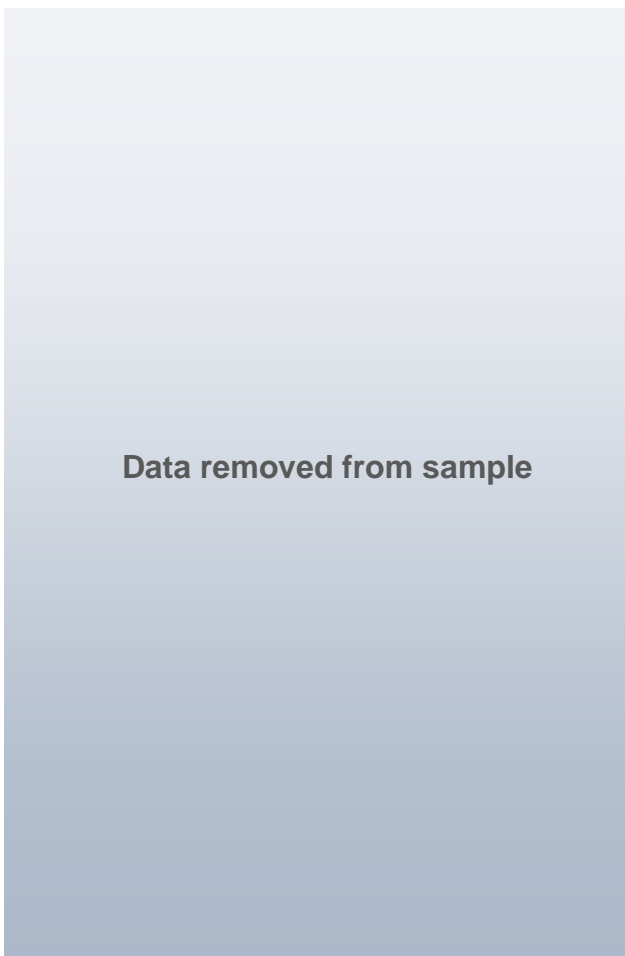
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 78 LBN Brand Shares of Luxury Portable Consumer Electronics: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample



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

Table 79 **Distribution of Luxury Portable Consumer Electronics by Format: % Value 2016-2021**

% retail value rsp

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
- Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- E-Commerce						
Total						

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

Table 80 **Forecast Sales of Luxury Portable Consumer Electronics by Category: Value 2021-2026**

GBP million

	2021	2022	2023	2024	2025	2026
- Luxury Mobile Phones - Luxury Wearables Luxury Portable Consumer Electronics	Data removed from sample					

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

Table 81 Forecast Sales of Luxury Portable Consumer Electronics by Category: % Value Growth 2021-2026

% constant value growth			
	2021/2022	2021-26 CAGR	2021/26 Total
- Luxury Mobile Phones - Luxury Wearables Luxury Portable Consumer Electronics	Data removed from sample		

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

LUXURY TIMEPIECES IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Most players suffer from the pandemic, but heritage brands fare better

2020 was a difficult year for luxury timepieces as a result of the lifestyle disruptions caused by COVID-19. The pandemic caused multiple lockdowns and social distancing restrictions, which

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A “new normal” in 2021 sees A rebound for luxury timepieces

As restrictions continue to be lifted in the UK, luxury outlets have now reopened and international travel seems to be recovering, albeit very slowly. As consumers ease into the

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Luxury timepieces sees an important transition to e-commerce

The watches industry has historically relied on store-based sales of luxury watches, due to their high price points and the emotional significance of buying a luxury watch in person.

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PROSPECTS AND OPPORTUNITIES

Digital innovations will become the norm

As e-commerce becomes an increasingly important channel for luxury timepieces, more

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Resale of luxury watches continues to grow

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CATEGORY DATA

Table 82 Sales of Luxury Timepieces by Category: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
- Men's Luxury Timepieces - Women's Luxury Timepieces Luxury Timepieces	Data removed from sample					

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

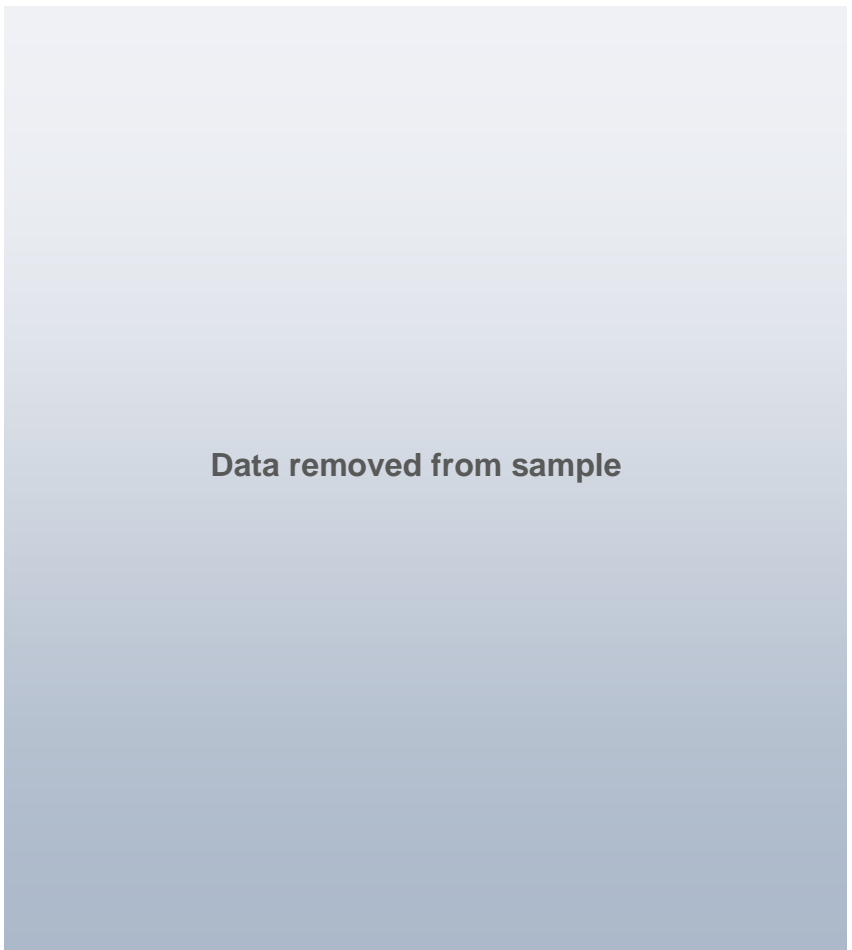
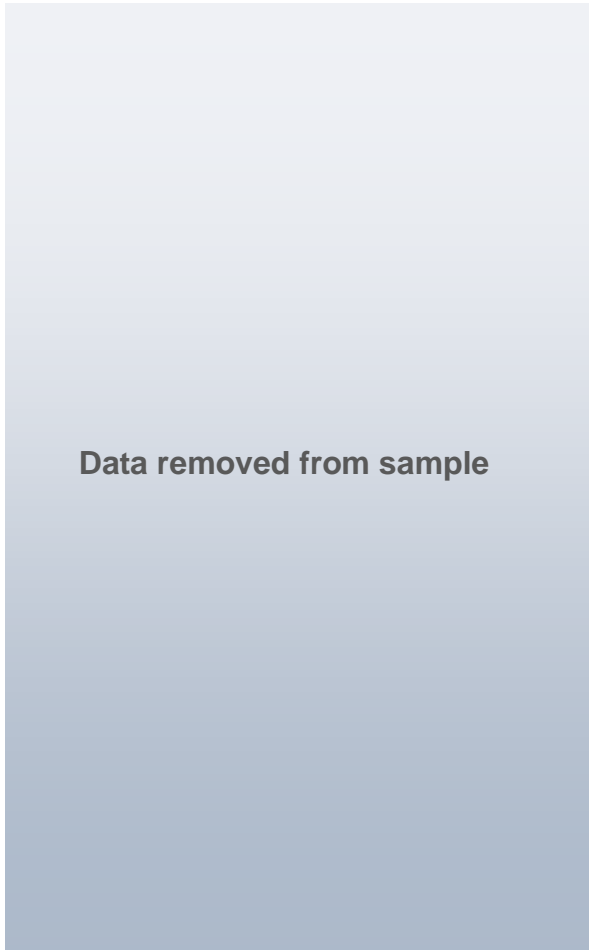
Table 83 Sales of Luxury Timepieces by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Men's Luxury Timepieces - Women's Luxury Timepieces Luxury Timepieces	Data removed from sample		

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

Table 84 NBO Company Shares of Luxury Timepieces: % Value 2016-2020

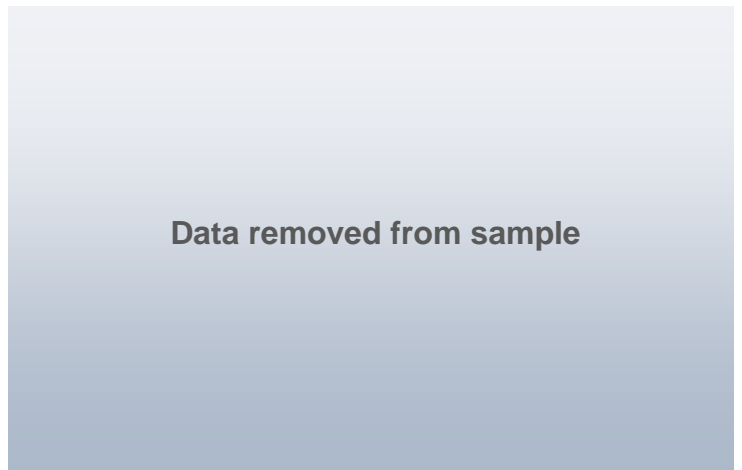
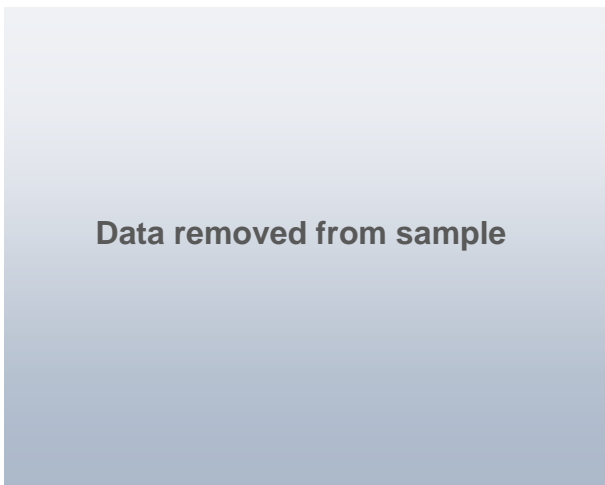
% retail value rsp Company	2016	2017	2018	2019	2020

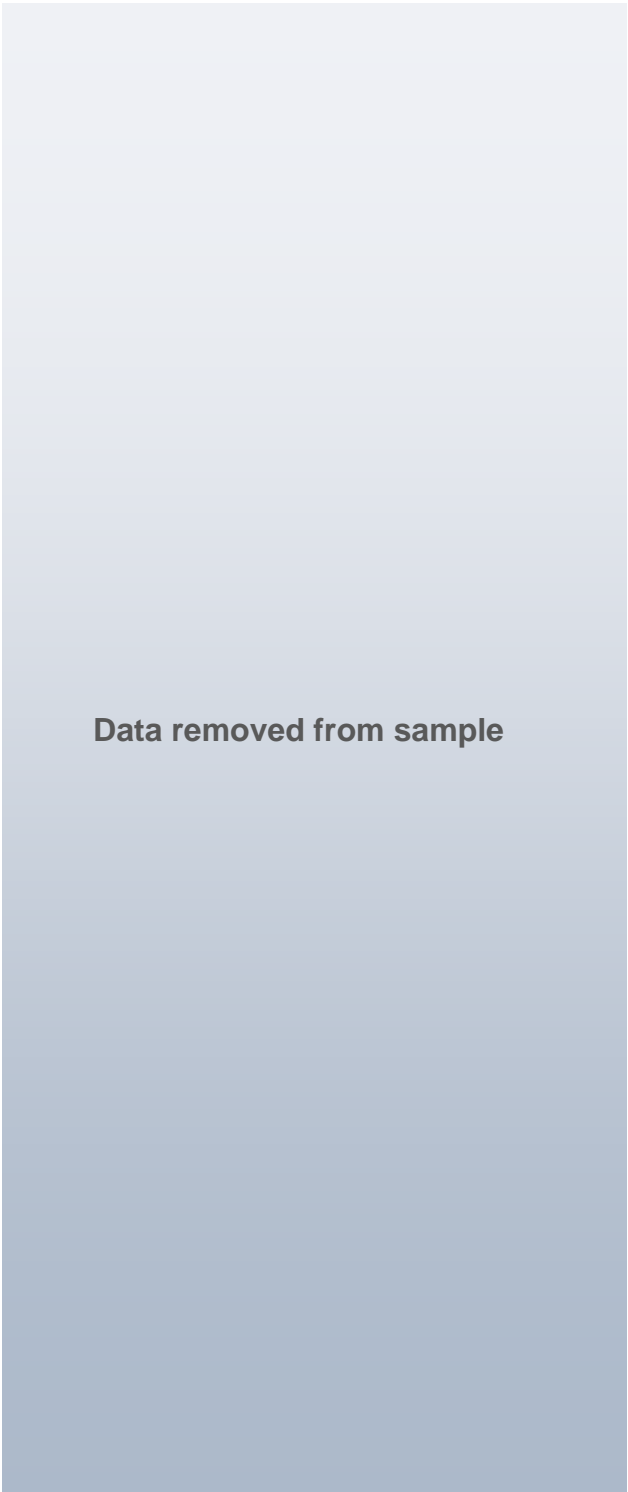
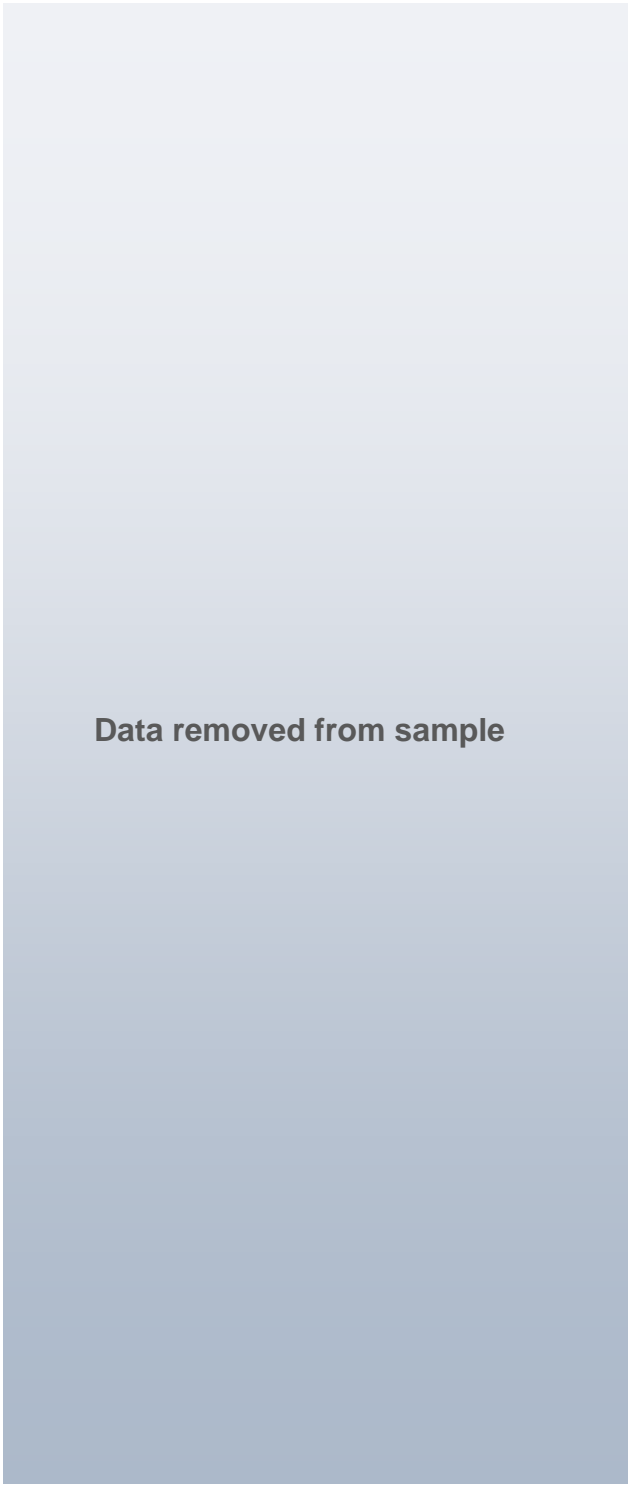


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 85 LBN Brand Shares of Luxury Timepieces: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 86 **Distribution of Luxury Timepieces by Format: % Value 2016-2021**

% retail value rsp

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
- Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- E-Commerce						
Total						

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

Table 87 Forecast Sales of Luxury Timepieces by Category: Value 2021-2026

GBP million

	2021	2022	2023	2024	2025	2026
- Men's Luxury Timepieces	Data removed from sample					
- Women's Luxury Timepieces						
Luxury Timepieces						

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

Table 88 Forecast Sales of Luxury Timepieces by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
- Men's Luxury Timepieces	Data removed from sample		
- Women's Luxury Timepieces			
Luxury Timepieces			

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

LUXURY WRITING INSTRUMENTS AND STATIONERY IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Luxury writing instruments sees signs of recovery in 2021

Sales of luxury writing instruments and stationery slumped in 2020, like many other luxury

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Heritage brands still dominate the category

Montblanc remains the leader in luxury writing instruments in the UK, followed by Smythson of

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E-commerce offers an opportunity for luxury writing instruments

During the pandemic, smaller brands, which are generally nimbler in creating an omnichannel

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PROSPECTS AND OPPORTUNITIES

Pandemic lifestyle disruptions create new interest in luxury writing instruments

The lifestyle disruptions caused by lockdowns and social distancing restrictions to contain the

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Pre-owned writing instruments offer unique value

The second-hand market for luxury goods is set to continue to grow, as consumers, looking for meaningful purchases, seek out goods that are unique and exceptional. As more consumers

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CATEGORY DATA

Table 89 Sales of Luxury Writing Instruments and Stationery: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
Luxury Writing Instruments and Stationery	Data removed from sample					

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

Table 90 Sales of Luxury Writing Instruments and Stationery: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Luxury Writing Instruments and Stationery	Data removed from sample		

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

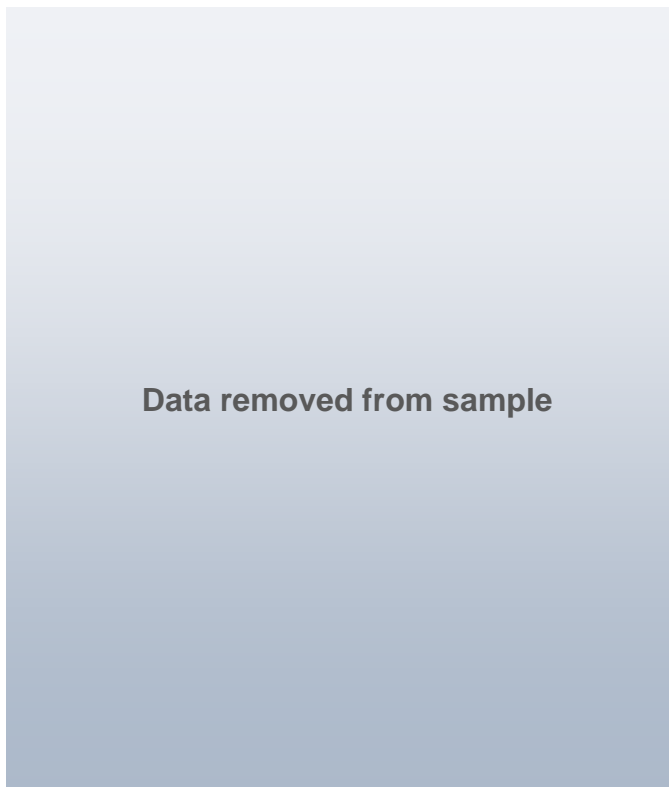
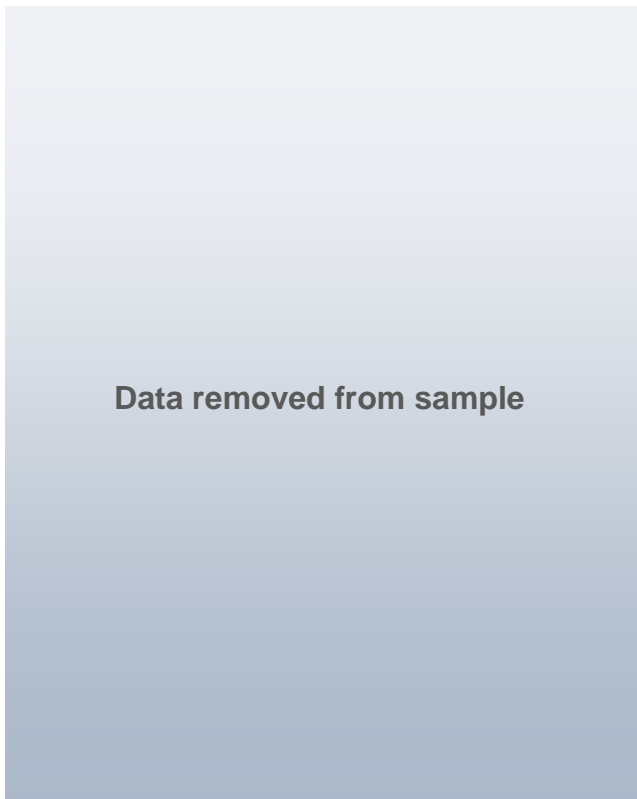
Table 91 NBO Company Shares of Luxury Writing Instruments and Stationery: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
	Data removed from sample				

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

Table 92 LBN Brand Shares of Luxury Writing Instruments and Stationery: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020



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

Table 93 Distribution of Luxury Writing Instruments and Stationery by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
- Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing	Data removed from sample					
- E-Commerce						
Total	Data removed from sample					

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

Table 94 Forecast Sales of Luxury Writing Instruments and Stationery: Value 2021-2026

GBP million	2021	2022	2023	2024	2025	2026
Luxury Writing Instruments and Stationery	Data removed from sample					

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

Table 95 Forecast Sales of Luxury Writing Instruments and Stationery: % Value Growth 2021-2026

% constant value growth

2021/2022

2021-26 CAGR

2021/26 Total

Luxury Writing Instruments and Stationery

Data removed from sample

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

SUPER PREMIUM BEAUTY AND PERSONAL CARE IN THE UNITED KINGDOM - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Pandemic beauty priorities remain, but some consumers crave the return of fun

Super premium skin care fared better than other super premium beauty and personal care categories in 2020 and the first half of 2021, as some consumers developed dedicated skin care

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Online purchasing is here to stay

Growth in the online beauty market was strong in the UK prior to the COVID-19 pandemic,

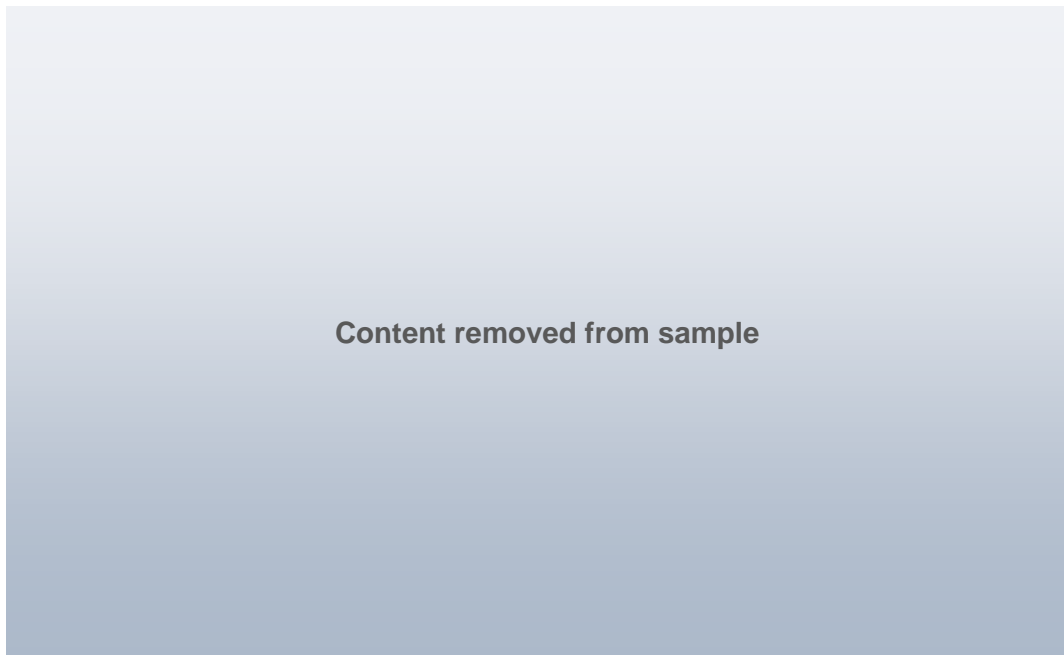
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PROSPECTS AND OPPORTUNITIES

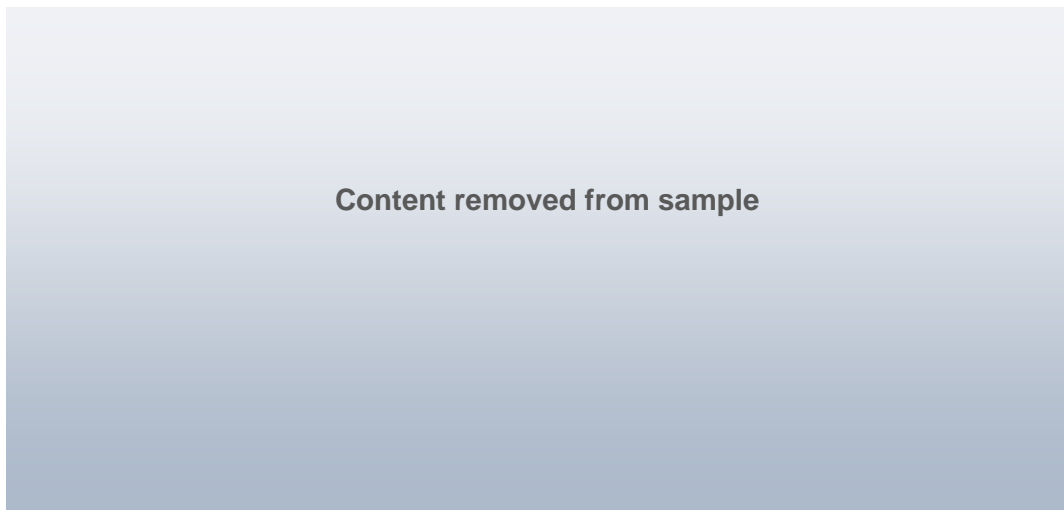
Brand authenticity, values and transparency

Super premium beauty and personal care is becoming increasingly crowded, with more players, such as Hermès and Valentino, releasing colour cosmetics lines. Beauty consumers



TikTok engagement is key for beauty players

The rise of TikTok can no longer be ignored by beauty brands, as swathes of users engage with the social media platform daily, which is appreciated for its openness and sense of



CATEGORY DATA

Table 96 Sales of Super Premium Beauty and Personal Care by Category: Value 2016-2021

GBP million	2016	2017	2018	2019	2020	2021
- Super Premium Colour Cosmetics	Data removed from sample					
- Super Premium Fragrances						
- Super Premium Skin Care						
- Other Super Premium Beauty and Personal Care						
Super Premium Beauty and Personal Care						

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

Table 97 Sales of Super Premium Beauty and Personal Care by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Super Premium Colour Cosmetics	Data removed from sample		
- Super Premium Fragrances			
- Super Premium Skin Care			
- Other Super Premium Beauty and Personal Care			
Super Premium Beauty and Personal Care			

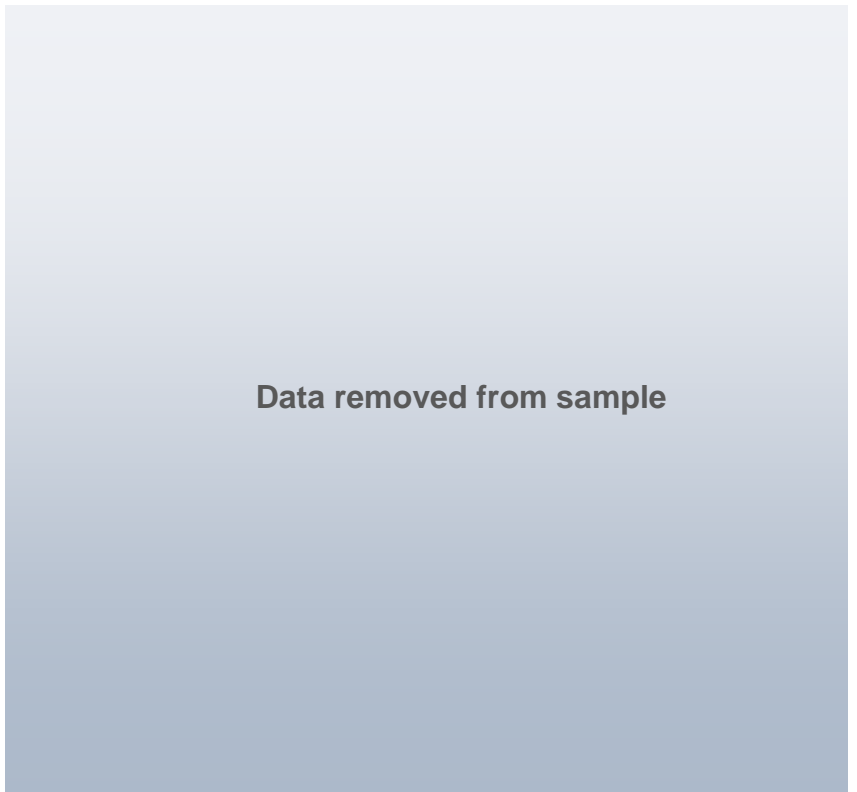
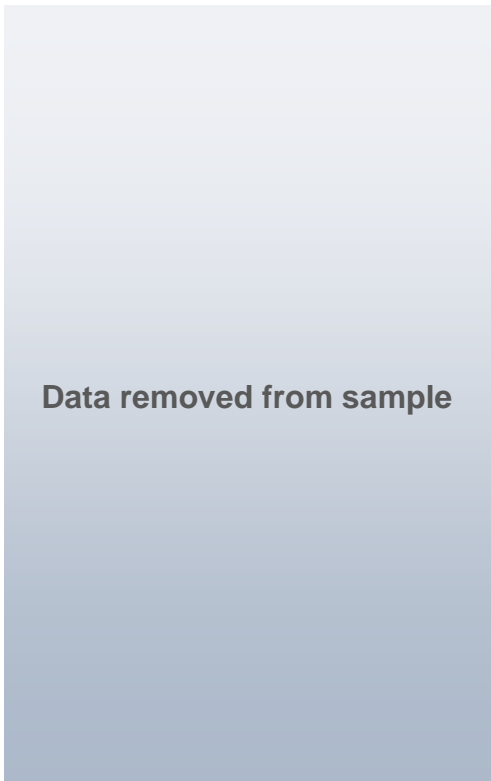
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 98 NBO Company Shares of Super Premium Beauty and Personal Care: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
	Data removed from sample				

Data removed from sample

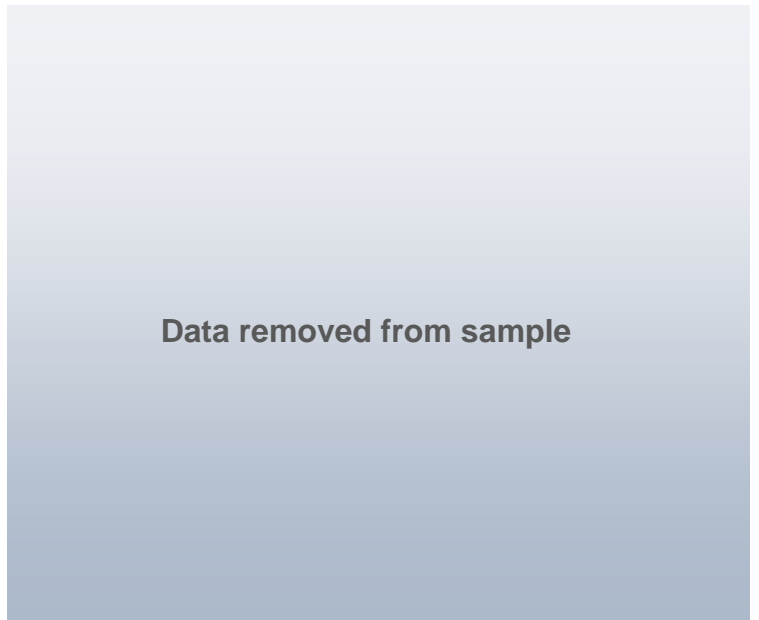
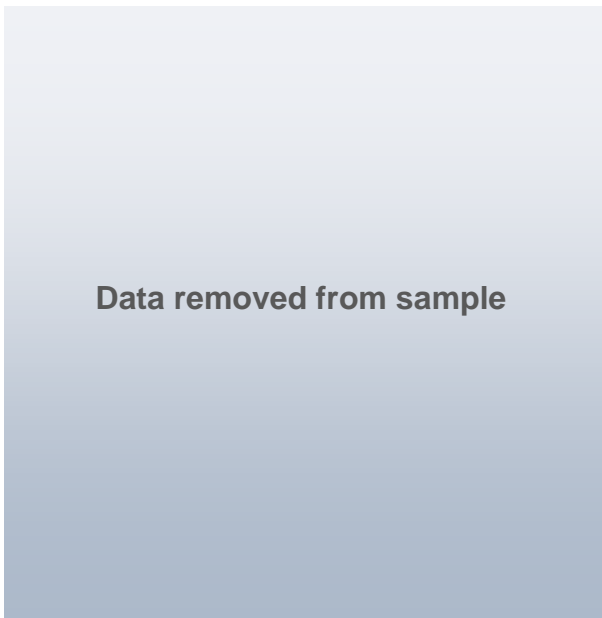
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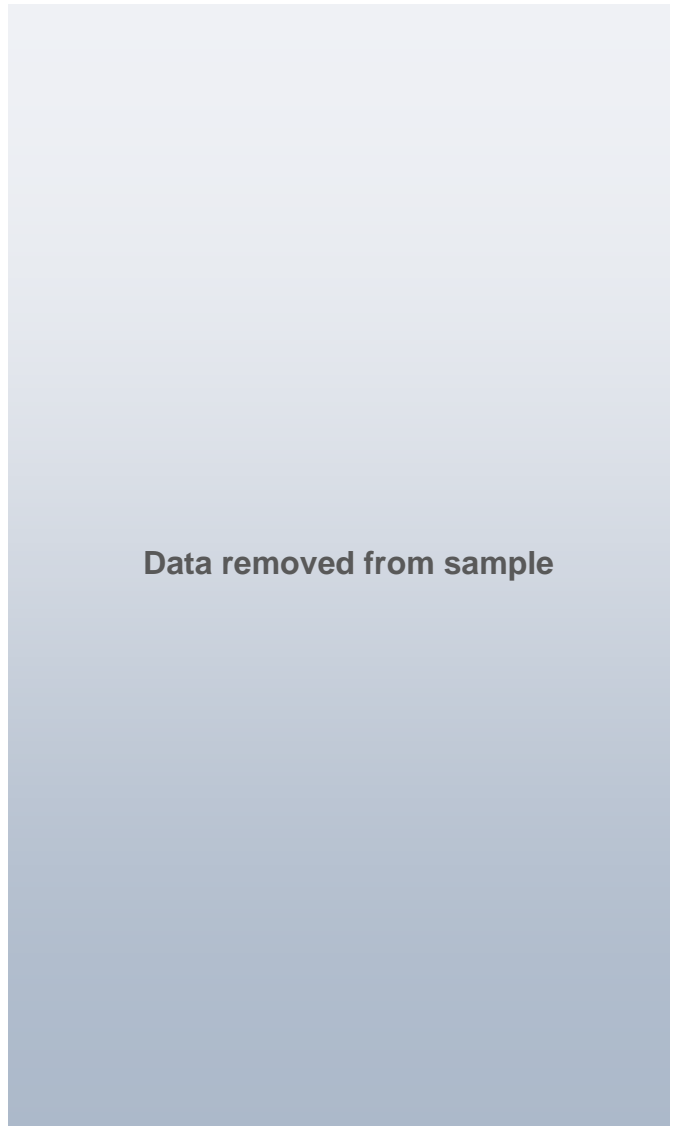
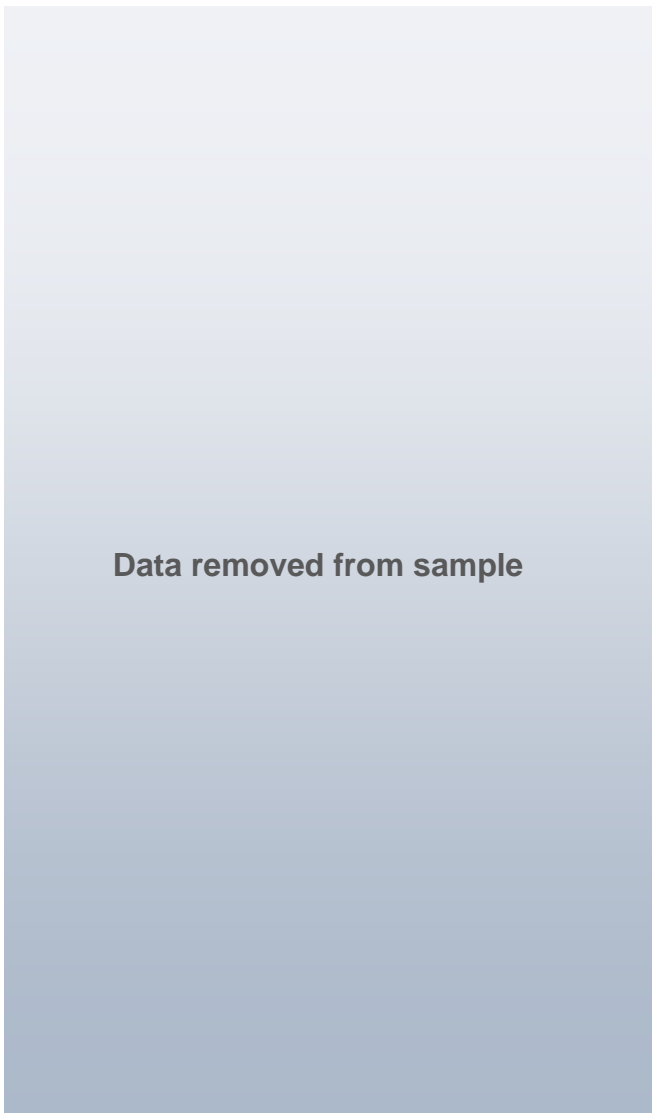


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 99 LBN Brand Shares of Super Premium Beauty and Personal Care: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 100 **Distribution of Super Premium Beauty and Personal Care by Format: % Value**
2016-2021

% retail value rsp

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
- Non-Grocery Specialists						
- Mixed Retailers	Data removed from sample					
Non-Store Retailing						
- E-Commerce						
Total	Data removed from sample					

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

Table 101 Forecast Sales of Super Premium Beauty and Personal Care by Category: Value 2021-2026

GBP million	2021	2022	2023	2024	2025	2026
- Super Premium Colour Cosmetics	Data removed from sample					
- Super Premium Fragrances						
- Super Premium Skin Care						
- Other Super Premium Beauty and Personal Care						
Super Premium Beauty and Personal Care						

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

Table 102 Forecast Sales of Super Premium Beauty and Personal Care by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
- Super Premium Colour Cosmetics	Data removed from sample		
- Super Premium Fragrances			
- Super Premium Skin Care			
- Other Super Premium Beauty and Personal Care			
Super Premium Beauty and Personal Care			

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