



L'ORÉAL
LUXE

DUPES AUDIT

FOCUS FRAGRANCE

MARCH 2025

US



EMPOWER YOUR BRAND

C1 - Internal use

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1 OBJECTIVES

L'Oréal Luxe has received a study decoding how & why consumers bypass traditional purchase circuits for high end beauty products in the fragrance, make up and skincare categories. This analysis allowed to understand the size and dynamics of dupes, consumer motivations, key consumer targets, key dupe brands and key products to be duped.

As a second step, Semantiweb is providing ID cards and mapping of top duped L'Oréal Luxe perfumes.

2 METHODOLOGY









Semantiweb leverages a social listening methodology: Consumer & KOL conversations on relevant social media, forums and in e-commerce reviews are extracted, tagged and structured for quantitative KPIs and analysed in order to provide context and qualitative deep dives.

ZOOM ON L'OREAL TOP DUPED PRODUCTS:



3 SCOPE & SOURCES


SOURCES

-  TikTok
-  Instagram
-  Reddit
-  YouTube
-  Blogs & Forums
-  X (Twitter)
-  Reviews
-  Google Search

PERIOD

FY 2023 – 2025

COUNTRY

USA 



PART 1: THE FRAGRANCE DUPE MARKET

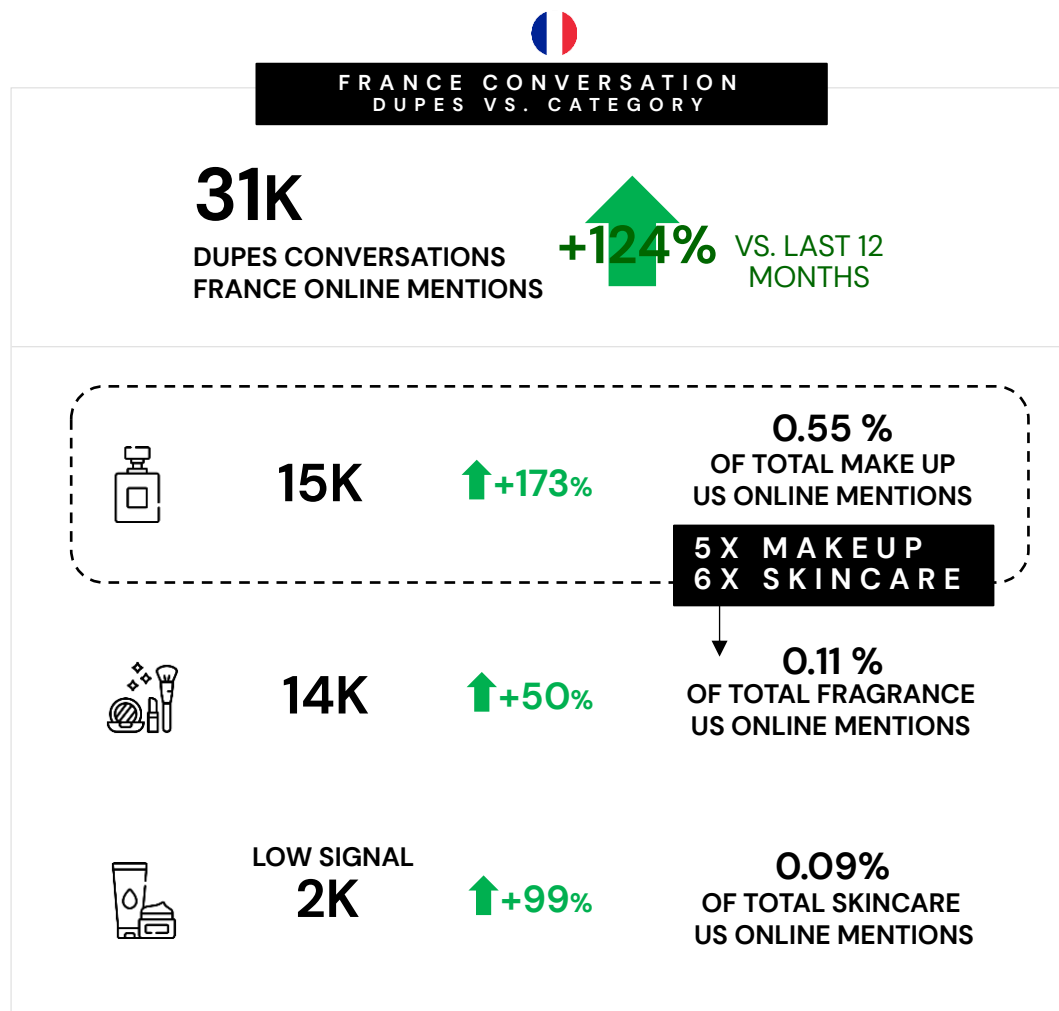
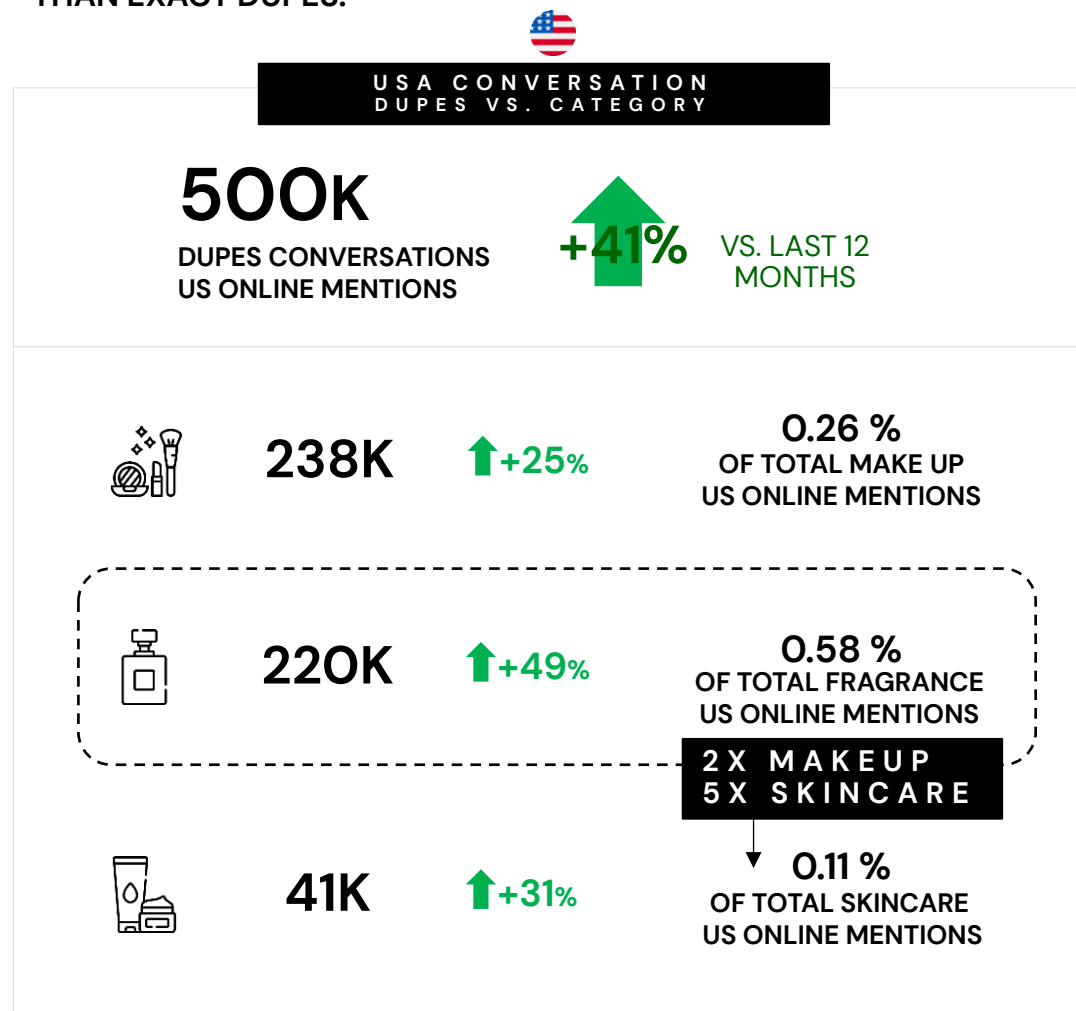
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DUPES CONVERSATIONS – WEIGHT WITHIN RESPECTIVE CATEGORIES

- **DUPES IN FRAGRANCE:** NUMBER 1 IN CATEGORY PENETRATION AND GROWTH ACROSS BOTH COUNTRIES
- **DUPES IN MAKEUP:** SLIGHTLY **HIGHER CONVERSATION VOLUMES** DUE TO THE DIVERSITY OF DUPED PRODUCTS AND AVAILABLE OPTIONS, THOUGH ITS OVERALL PENETRATION REMAINS LOWER COMPARED TO FRAGRANCE.
- **DUPES IN SKINCARE:** RARELY APPEARS IN DUPE DISCUSSIONS; WHEN IT DOES, THE FOCUS IS TYPICALLY ON **FINDING QUALITY ALTERNATIVES RATHER THAN EXACT DUPES.**



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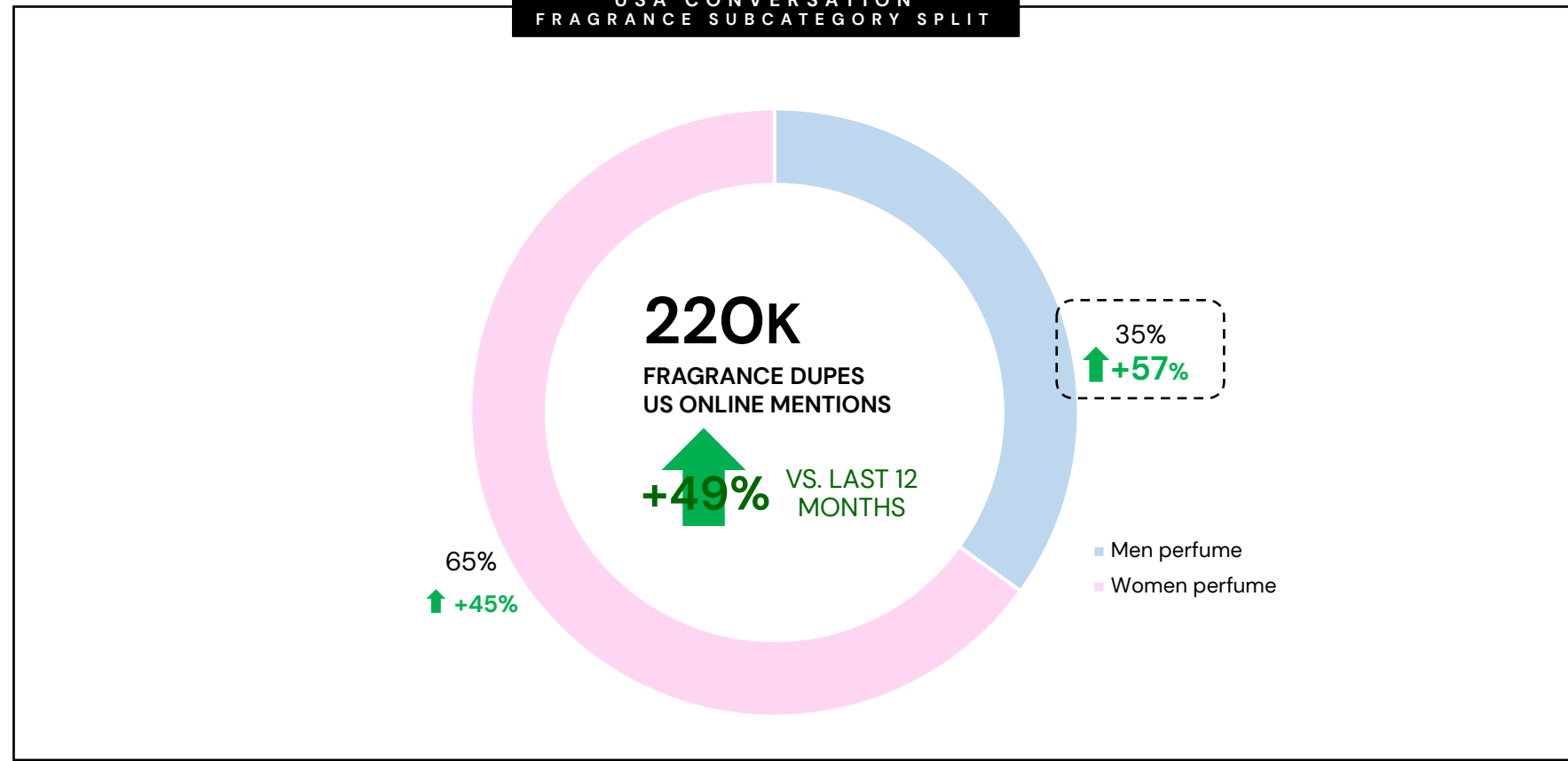


PERFUME DUPES MARKET IN THE US

- THE BYPASSING PHENOMENON IS A WELL-ESTABLISHED TREND IN THE US, PRIMARILY DRIVEN BY DUPE (~90% OF CONVERSATIONS), WITH FRAGRANCE BEING THE MOST IMPACTED CATEGORY.
- THE TOPIC OF PERFUME DUPES IS BOOMING IN THE U.S., EXPERIENCING SIGNIFICANT GROWTH, WITH A +49% INCREASE YEAR-OVER-YEAR.
- TRADITIONALLY, FRAGRANCE DUPING HAS BEEN DRIVEN BY WOMEN, HOWEVER, MEN'S FRAGRANCE DUPING IS RAPIDLY GAINING TRACTION, GROWING FASTER THAN WOMEN'S FRAGRANCE DISCUSSIONS. THIS SHIFT REFLECTS A RISING INTEREST AMONG MEN IN AFFORDABLE FRAGRANCE ALTERNATIVES, MAINLY DUE TO SOCIAL MEDIA INFLUENCERS.



USA CONVERSATION
FRAGRANCE SUBCATEGORY SPLIT



“ Looking for a good **LLP Dupe!** I'm a guy so I don't mind if it's more masculine, would also appreciate some knowledge on the other **Libre dupes** - I know the **Zara** one is popular but it seems to have been reformulated recently?

PERFUME DUPES MARKET IN THE US

IN THIS EXPANDING MARKET, DUPE PERFUMES ARE BECOMING A CATEGORY OF THEIR OWN, WITH BRANDS SETTING THEMSELVES APART BY DEVELOPING UNIQUE CHARACTERISTICS AND COMPETITIVE ADVANTAGES.

DUPE BRANDS ARE COPYING:

#1

THE OLFACTION TO OBTAIN THE SAME SCENT:

- SAME KEY INGREDIENTS
- SOMETIMES SAME OLFACTIVE PYRAMIDS
- SAME OLFACTIVE FAMILY
- COMMON ACCEPTANCE OF LACK OF SAME LONGEVITY

#2

THE CONCEPT & UNIVERSE:

- VIBE (IE: COCOONING, WARM)
- LANDSCAPE (IE: BY THE FIREPLACE)
- PERFUME TREND (IE: IT GIRL, SMELLS LIKE OLD MONEY)
- SEASONALITY (IE: FALL WOODY SCENT)
- OLFACTIVE CONCEPT (IE: FEMININE SCENT WITH FOUGERE STRUCTURE).

#3

THE PRODUCT MIX:

- NAME (SAME KEYWORDS OR IMAGE, AND FONT)
- ICONIC PACK (BOTTLE SHAPE, JUICE COLOR, ACCESSORIES LIKE BOWS)

DUPE MARKET IS STRUCTURED AROUND THREE MAIN CLUSTERS:

1. MASSTIGE (33%*)

CHARACTERIZED BY ITS **PHYSICAL ACCESSIBILITY** AND THE **POPULARITY AND CREDIBILITY** OF THE BRANDS WITHIN IT.



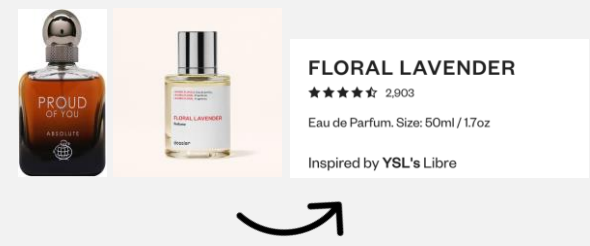
2. ORIENTALS (27%*)

"DUBAÏ PERFUMES" OR "MIDDLE-EASTERN/ ARABIAN/ARABIC CLONES" WHICH HAVE BECOME HIGHLY POPULAR AND SPECIALIZE IN OFFERING **EXCELLENT VALUE FOR MONEY**, DISTINGUISHED BY THEIR **OLFACTORY QUALITY, LONGEVITY, AND REFINED PACKAGING**.



3. EXPLICIT DUPES (23%*)

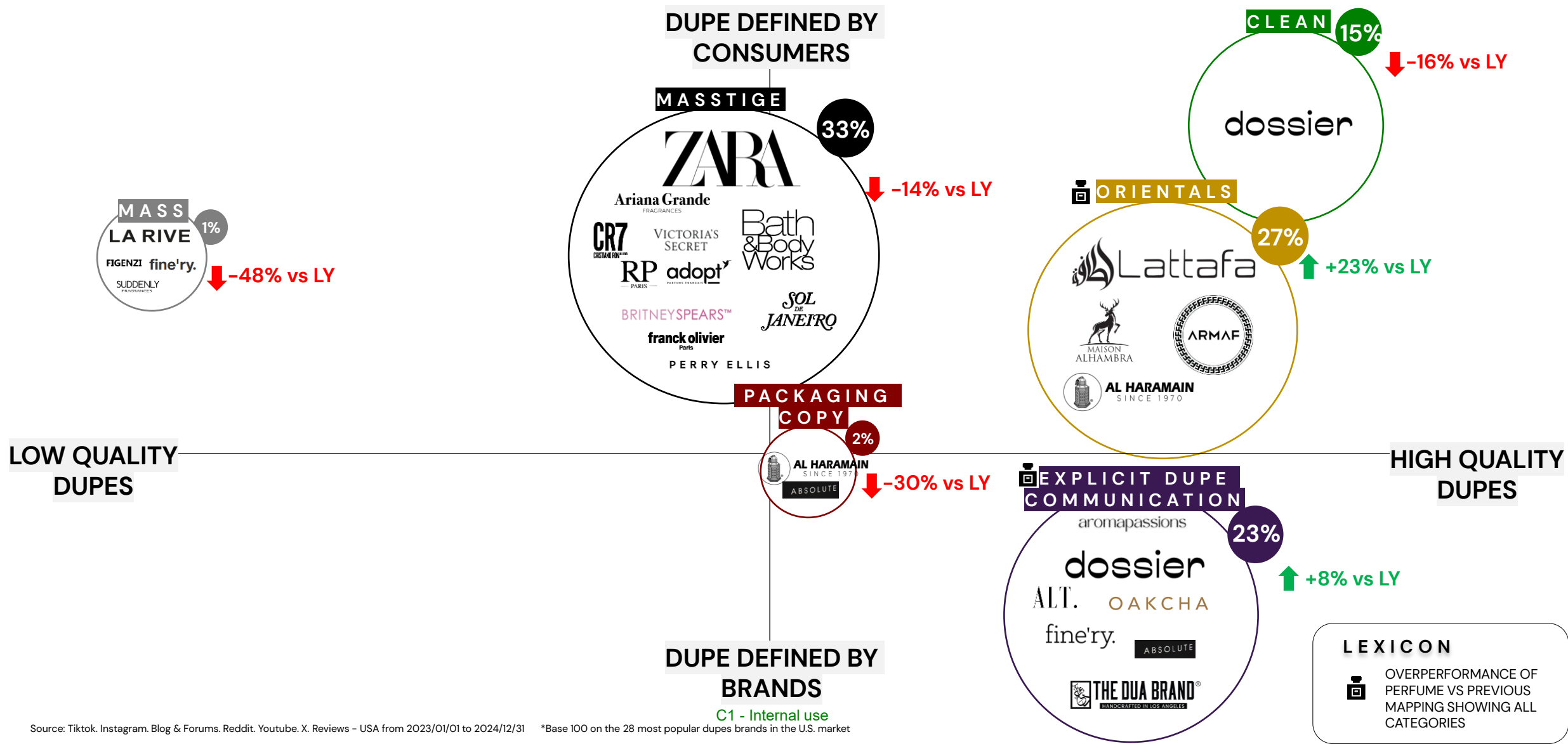
REFERRING TO BRANDS THAT **OPENLY POSITION** THEIR PRODUCTS AS **INSPIRED BY SPECIFIC PERFUMES**, REPLICATING THE EXACT NOTES AND / OR THE OVERALL AESTHETIC.






PERFUME DUPES MAPPING – A DIVERSE LANDSCAPE, NOT LONGER PRICE-DRIVEN ONLY.

ALTHOUGH MASSTIGE REMAINS THE MAIN CLUSTER, IT IS THE ORIENTAL DUPES AND EXPLICIT DUPES THAT ARE GROWING THE MOST (+23% and +8% vs LY) IN DISCUSSIONS. THIS CLEARLY HIGHLIGHTS A TREND TOWARD HIGHER-QUALITY DUPES RATHER THAN LOW-COST ALTERNATIVES. A SIGNIFICANT SHARE IS ALSO GIVEN TO SO-CALLED "CLEAN" DUPES, WHICH IS DRIVEN BY ONE MAJOR BRAND: DOSSIER.










Source: Tiktok. Instagram. Blog & Forums. Reddit. Youtube. X. Reviews – USA from 2023/01/01 to 2024/12/31 *Base 100 on the 28 most popular dupes brands in the U.S. market

LEXICON

 OVERPERFORMANCE OF PERFUME VS PREVIOUS MAPPING SHOWING ALL CATEGORIES







TOP PERFUME DUPE PLAYERS – 6 DUPES BRANDS IN THE U.S TO WATCH CLOSELY

RANKING	BRAND	SHARE OF VOICE**.	GROWTH vs LY
1.	ZARA	23%	↓ -32% 
2.	Lattafa	17%	↑ +53% 
3.	dossier	16%	↓ -15%  
4.	ARMAF	8%	↓ -30% 
5.	Bath & Body Works	5%	↑ +85% 
6.	OAKCHA	4%	↑ +14% 

ZARA IS THE MOST DISCUSSED IN THE DUPE PERFUME INDUSTRY, ACCOUNTING FOR NEARLY A QUARTER OF SHARE OF VOICE, FOLLOWED BY LATTAFA (17%) AND DOSSIER (16%).

HOWEVER, LATTAFA IS ON TRACK TO SURPASS THE LEADER WITH +53% YOY GROWTH.

LEXICON

-  MASSTIGE BRAND
-  EXPLICIT DUPE BRAND
-  ORIENTAL DUPE BRAND
-  CLEAN DUPE BRAND

*Source: Tiktok. Instagram. Blog & Forums. Reddit. Youtube. X. Reviews – USA from 2023/01/01 to 2024/12/31 **Base 100 on the TOP 20 dupes brands in the U.S. market



PART 2: KEY DRIVERS & BARRIERS TO PURCHASE

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REMINDER ALL CATEGORIES- KEY CONSUMER DRIVERS IN THE US

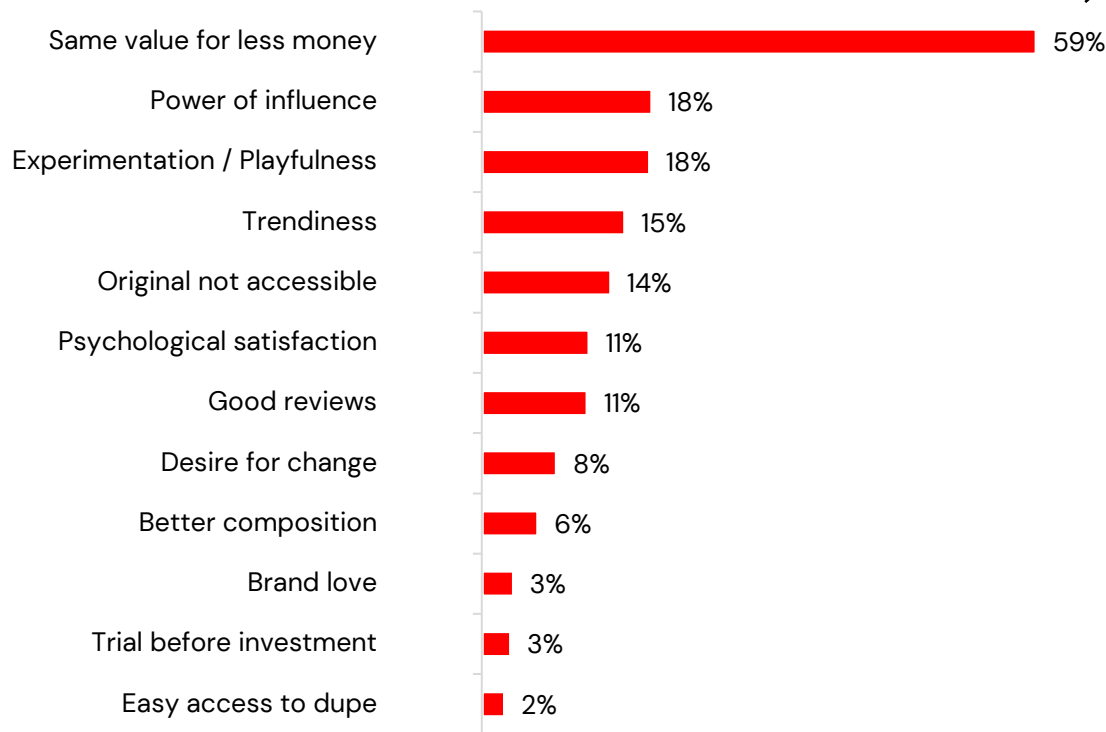
WHAT ARE THE REASONS FOR CONSUMERS TO CHOOSE A DUPE OVER THE ORIGINAL PRODUCT?

THE MAIN REASON IS THE **SAME VALUE FOR LESS MONEY PERCEPTION**.

OTHER REASONS FOR US CONSUMERS TO PURCHASE DUPES INCLUDE:

- **POWER OF INFLUENCE** (PEER INFLUENCE OR PERSUASIVE POWER,. TRENDINESS OF THE PRODUCT. GOOD REVIEWS ONLINE)
- **WILLINGNESS TO EXPERIMENT** (TRY PRODUCTS AND TRIAL BEFORE INVESTMENT)
- **ACCESSIBILITY** (ORIGINAL PRODUCT NOT ACCESSIBLE OR DISCONTINUED. EASY ACCESS TO DUPE WHERE CONSUMERS SHOP)
- **BRAND & PRODUCT LOVE** (STOP LOVING THE ORIGINAL. AND LOVING THE DUPE BRAND)

KEY CONSUMERS DRIVERS
US
(% OF MENTIONED DRIVERS)



WHAT IS SAME VALUE? SAME SCENT. SAME FINISH. SAME EFFECT ON THE SKIN.
-> The higher price of the original is associated to marketing & simple presence of branding.

PRICE TOO HIGH FOR ORIGINAL

“ Looking for a Lime crime “cola” lipstick dupe. I like this formula because it’s basically a matte lip stain and I’m trying to find a dupe **cause this is 20 dollars..**

POWER OF INFLUENCE

“ Always nice to be around my girl friends cause I get recommended all these new skincare products and cheap dupes

HIGH PRICE FOR BRANDING

“ All the makeup brushes. No brush is worth that much. Get some dupes off of shein or somewhere else because that **high price is mostly just cause of the name.**

EXPERIMENTATION & TRENDINESS

“ Can you please share some dupes perfume name - **Really wanted to try the most hyped dupes**

ACCESSIBILITY

“ I only have dupes cause **it’s no longer available** due to the manufacturer closing.

“ if u want to know dupes cause her lipstick is sold out let me know

“ I’ve never tried the original. but I have the Lash n Roll mascara. and it gave me a lot of length. **I just brought it cause I needed mascara while I was at Ulta.** I didn't like get because it was a dupe. But I'd definitely buy it again when I need a new mascara.