



Passport

Fragrances in India

Euromonitor International

July 2024

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purposes only.

Some content and data have been
changed.

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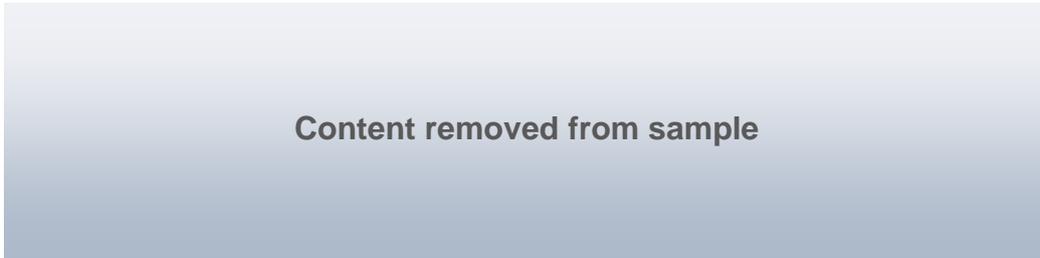
LIST OF CONTENTS AND TABLES

| | |
|---|----|
| Fragrances in India - Category Analysis..... | 1 |
| KEY DATA FINDINGS..... | 1 |
| 2023 DEVELOPMENTS..... | 1 |
| Fragrances in india showcases double-digit growth, fuelled by increased usage occasions | 1 |
| Premium women's fragrances remains the best-performing category in 2023 | 1 |
| Miniature fragrances gain popularity across the mass and premium segments | 2 |
| PROSPECTS AND OPPORTUNITIES..... | 2 |
| Availability and accessibility of premium brands set to drive growth..... | 2 |
| Impulse purchases via hyperlocal platforms to accentuate growth for mass fragrances | 3 |
| Emerging trends in fragrance consumption to drive growth in the forecast period | 3 |
| CATEGORY DATA..... | 4 |
| Table 1 Sales of Fragrances by Category: Value 2018-2023..... | 4 |
| Table 2 Sales of Fragrances by Category: % Value Growth 2018-2023 | 4 |
| Table 3 NBO Company Shares of Fragrances: % Value 2019-2023 | 4 |
| Table 4 LBN Brand Shares of Fragrances: % Value 2020-2023..... | 5 |
| Table 5 LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023 | 6 |
| Table 6 LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023 | 7 |
| Table 7 Forecast Sales of Fragrances by Category: Value 2023-2028..... | 8 |
| Table 8 Forecast Sales of Fragrances by Category: % Value Growth 2023-2028 | 8 |
| Beauty and Personal Care in India - Industry Overview | 10 |
| EXECUTIVE SUMMARY | 10 |
| Beauty and personal care in 2023: The big picture | 10 |
| 2023 key trends | 10 |
| Competitive landscape | 11 |
| Retailing developments | 12 |
| What next for beauty and personal care? | 13 |
| MARKET DATA..... | 13 |
| Table 9 Sales of Beauty and Personal Care by Category: Value 2018-2023..... | 13 |
| Table 10 Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023 | 14 |
| Table 11 GBO Company Shares of Beauty and Personal Care: % Value 2019-2023 | 14 |
| Table 12 NBO Company Shares of Beauty and Personal Care: % Value 2019-2023 | 15 |
| Table 13 LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023 | 16 |
| Table 14 Distribution of Beauty and Personal Care by Format: % Value 2018-2023 | 17 |
| Table 15 Distribution of Beauty and Personal Care by Format and Category: % Value 2023..... | 18 |
| Table 16 Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028 | 20 |
| Table 17 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028 | 20 |

DISCLAIMER 21
SOURCES..... 21
 Summary 1 Research Sources..... 21

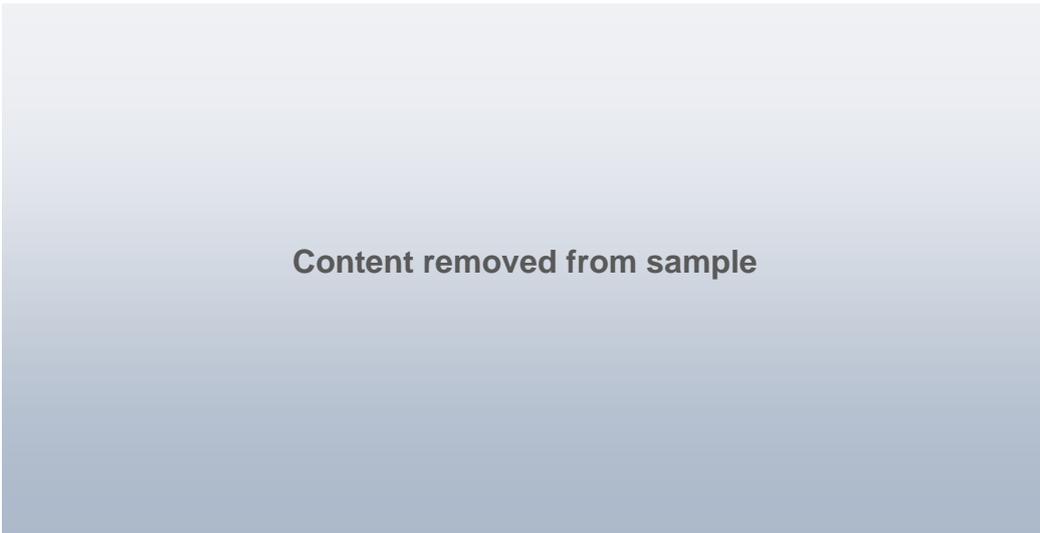
FRAGRANCES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

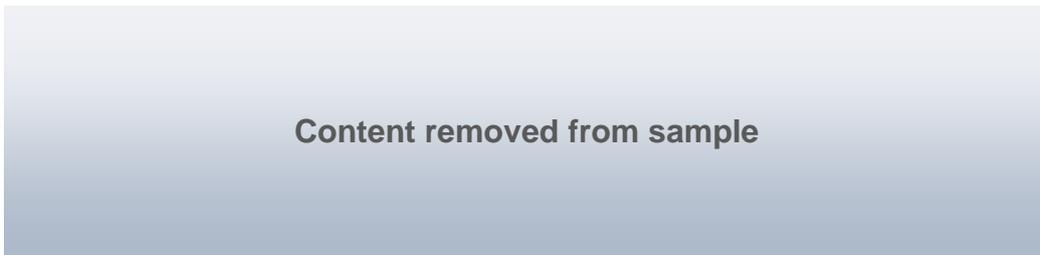


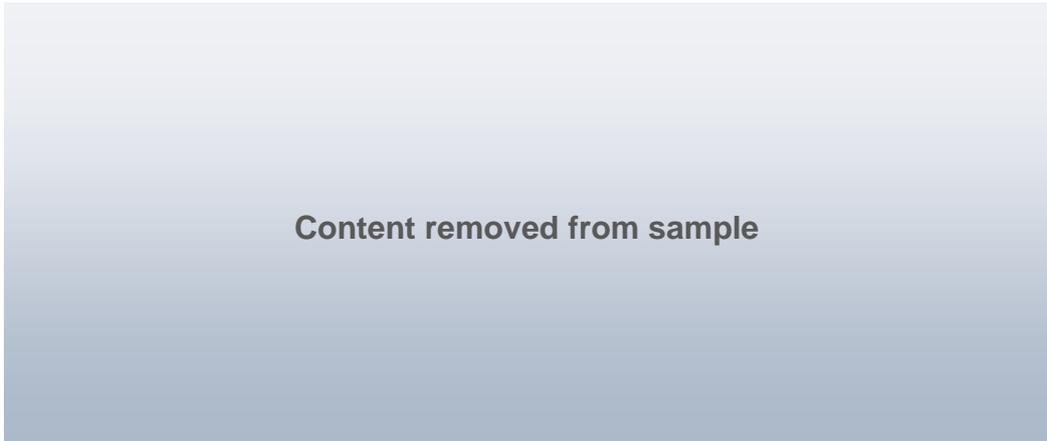
2023 DEVELOPMENTS

Fragrances in india showcases double-digit growth, fuelled by increased usage occasions



Premium women's fragrances remains the best-performing category in 2023



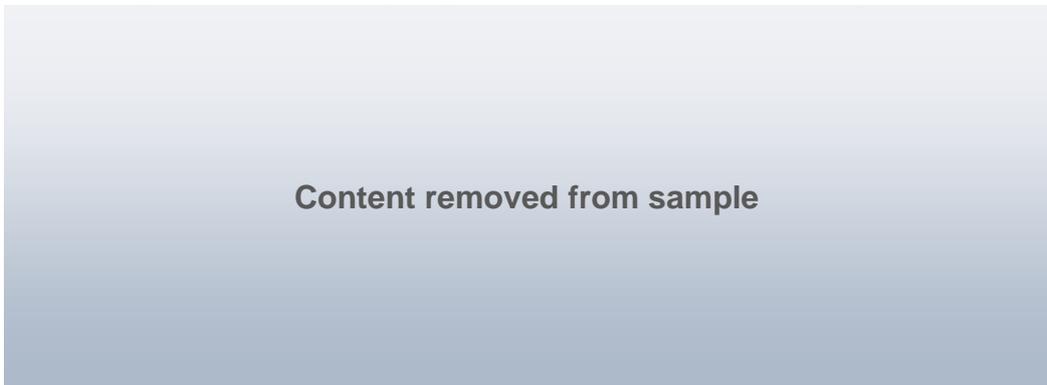


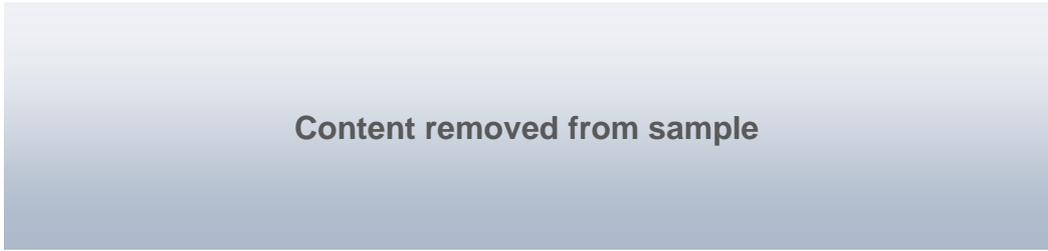
Miniature fragrances gain popularity across the mass and premium segments



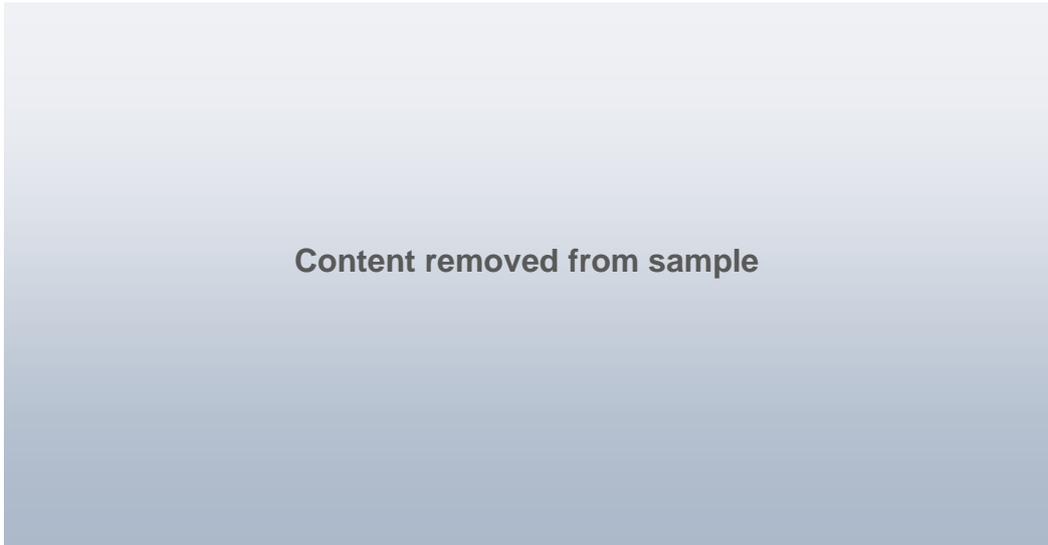
PROSPECTS AND OPPORTUNITIES

Availability and accessibility of premium brands set to drive growth





Impulse purchases via hyperlocal platforms to accentuate growth for mass fragrances



Emerging trends in fragrance consumption to drive growth in the forecast period



CATEGORY DATA

Table 1 Sales of Fragrances by Category: Value 2018-2023

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|-------------------------------|---------------------------------|------|------|------|------|------|
| Fragrances | Data removed from sample | | | | | |
| Premium Fragrances | | | | | | |
| - Premium Men's Fragrances | | | | | | |
| - Premium Women's Fragrances | | | | | | |
| - Premium Unisex Fragrances | | | | | | |
| - Premium Fragrance Sets/Kits | | | | | | |
| Mass Fragrances | | | | | | |
| - Mass Men's Fragrances | | | | | | |
| - Mass Women's Fragrances | | | | | | |
| - Mass Unisex Fragrances | | | | | | |
| - Mass Fragrance Sets/Kits | | | | | | |

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 2018-2023

| % current value growth | 2022/23 | 2018-23 CAGR | 2018/23 Total |
|-------------------------------|---------------------------------|--------------|---------------|
| Fragrances | Data removed from sample | | |
| Premium Fragrances | | | |
| - Premium Men's Fragrances | | | |
| - Premium Women's Fragrances | | | |
| - Premium Unisex Fragrances | | | |
| - Premium Fragrance Sets/Kits | | | |
| Mass Fragrances | | | |
| - Mass Men's Fragrances | | | |
| - Mass Women's Fragrances | | | |
| - Mass Unisex Fragrances | | | |
| - Mass Fragrance Sets/Kits | | | |

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

Table 3 NBO Company Shares of Fragrances: % Value 2019-2023

| % retail value rsp Company | 2019 | 2020 | 2021 | 2022 | 2023 |
|---------------------------------|------|------|------|------|------|
| 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 4 LBN Brand Shares of Fragrances: % Value 2020-2023

| % retail value rsp Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|

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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 Premium Men's Fragrances: % Value 2020-2023

| % retail value rsp Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|

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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 6 LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

| % retail value rsp Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|

Data removed from sample



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

Table 7 Forecast Sales of Fragrances by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|-------------------------------|--------------------------|------|------|------|------|------|
| Fragrances | Data removed from sample | | | | | |
| Premium Fragrances | | | | | | |
| - Premium Men's Fragrances | | | | | | |
| - Premium Women's Fragrances | | | | | | |
| - Premium Unisex Fragrances | | | | | | |
| - Premium Fragrance Sets/Kits | | | | | | |
| Mass Fragrances | | | | | | |
| - Mass Men's Fragrances | | | | | | |
| - Mass Women's Fragrances | | | | | | |
| - Mass Unisex Fragrances | | | | | | |
| - Mass Fragrance Sets/Kits | | | | | | |

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

Table 8 Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|-------------------------------|--------------------------|--------------|---------------|
| Fragrances | Data removed from sample | | |
| Premium Fragrances | | | |
| - Premium Men's Fragrances | | | |
| - Premium Women's Fragrances | | | |
| - Premium Unisex Fragrances | | | |
| - Premium Fragrance Sets/Kits | | | |
| Mass Fragrances | | | |
| - Mass Men's Fragrances | | | |
| - Mass Women's Fragrances | | | |

- Mass Unisex Fragrances
- Mass Fragrance Sets/Kits

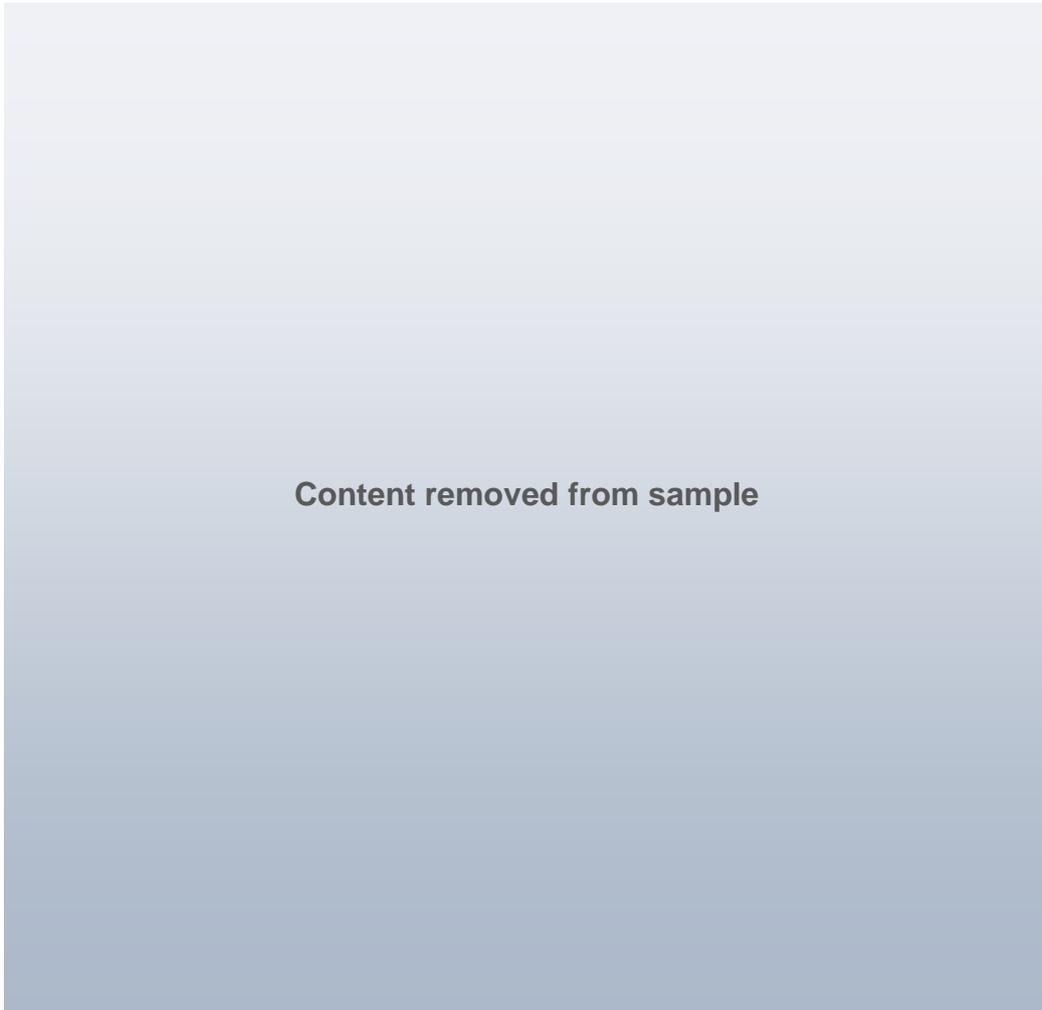
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

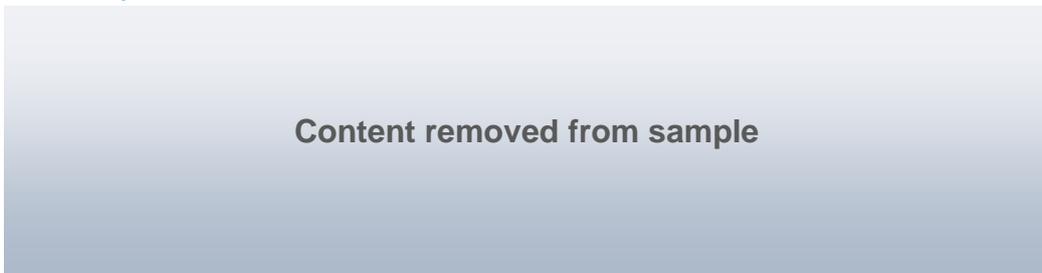
BEAUTY AND PERSONAL CARE IN INDIA - INDUSTRY OVERVIEW

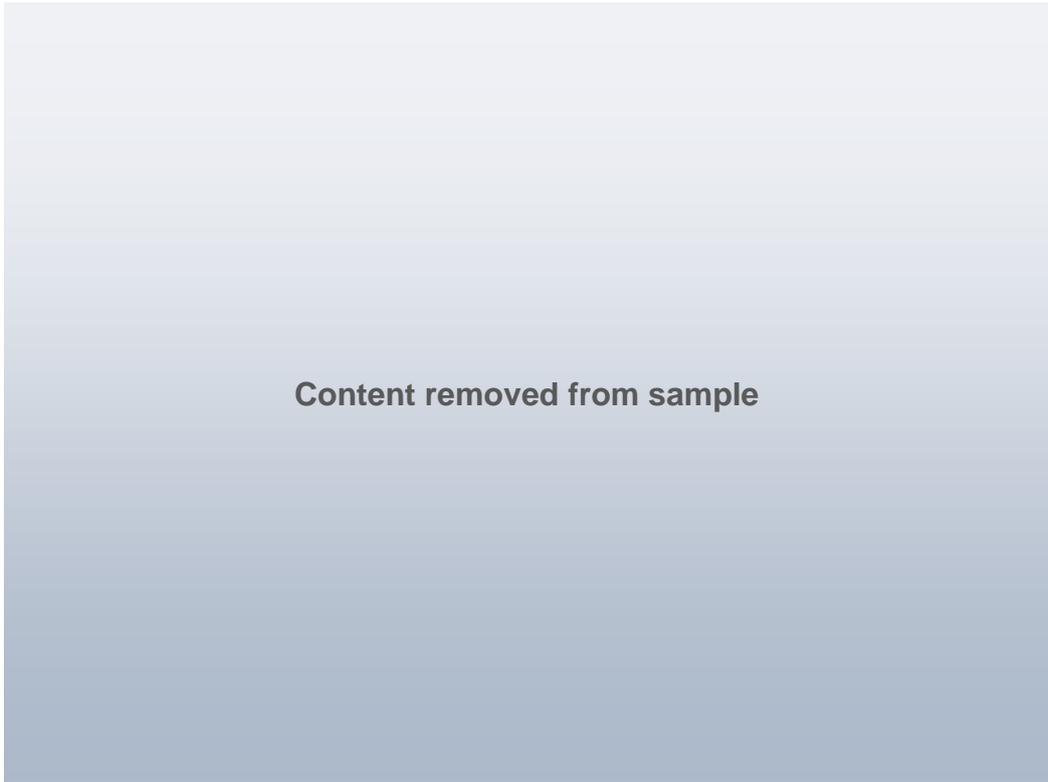
EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

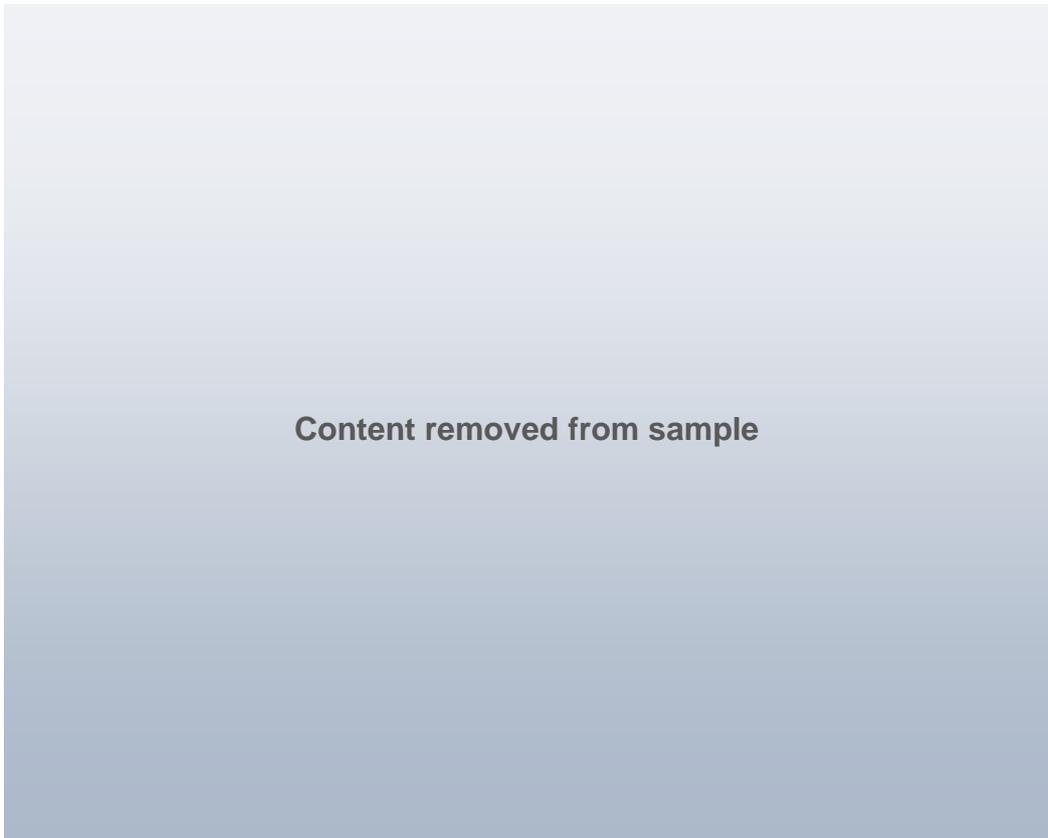


2023 key trends





Competitive landscape

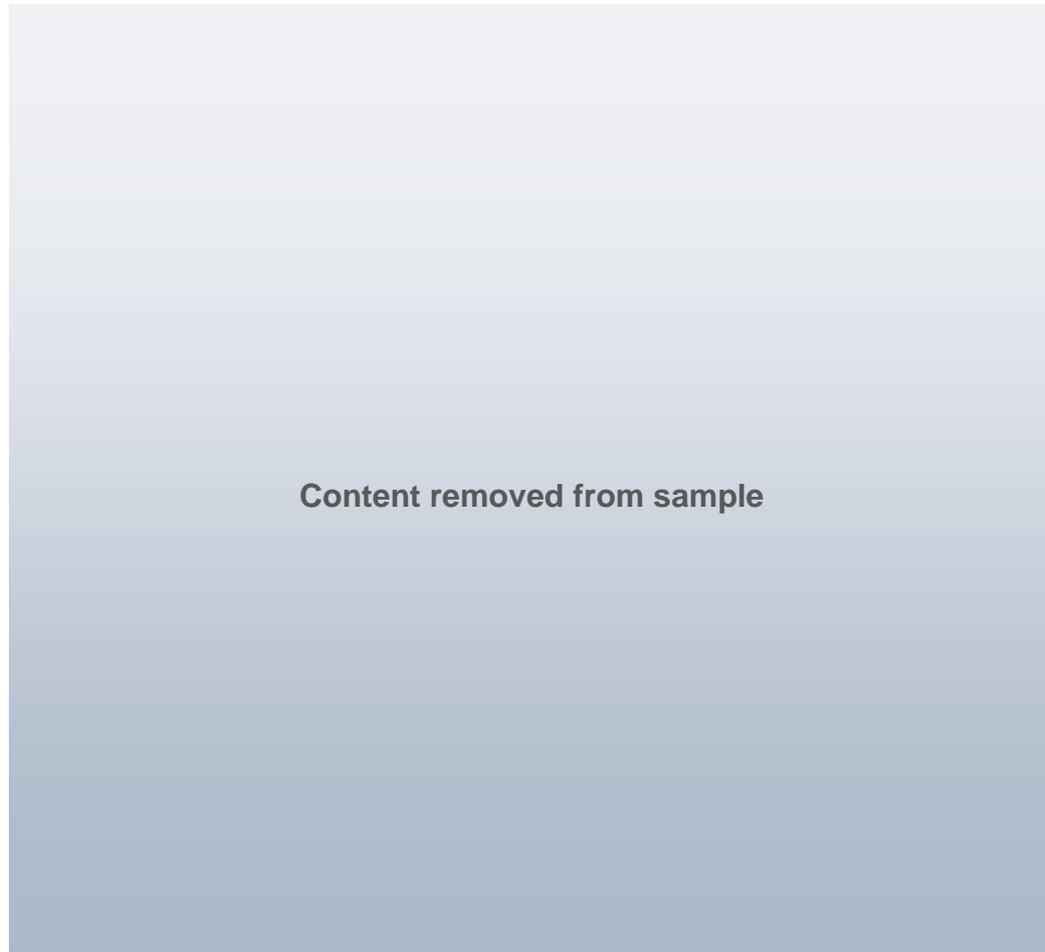


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Retailing developments

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What next for beauty and personal care?



MARKET DATA

Table 9 Sales of Beauty and Personal Care by Category: Value 2018-2023

| INR million | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------------------|--------------------------|------|------|------|------|------|
| Beauty and Personal Care | Data removed from sample | | | | | |
| Baby and Child-specific Products | | | | | | |
| Bath and Shower | | | | | | |
| Colour Cosmetics | | | | | | |
| Deodorants | | | | | | |
| Depilatories | | | | | | |
| Fragrances | | | | | | |
| Hair Care | | | | | | |
| Men's Grooming | | | | | | |
| Oral Care | | | | | | |
| Oral Care Excl Power | | | | | | |
| Toothbrushes | | | | | | |
| Skin Care | | | | | | |

Data removed from sample

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

Table 12 NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

| % retail value rsp Company | 2019 | 2020 | 2021 | 2022 | 2023 |
|-------------------------------|------|------|------|------|------|
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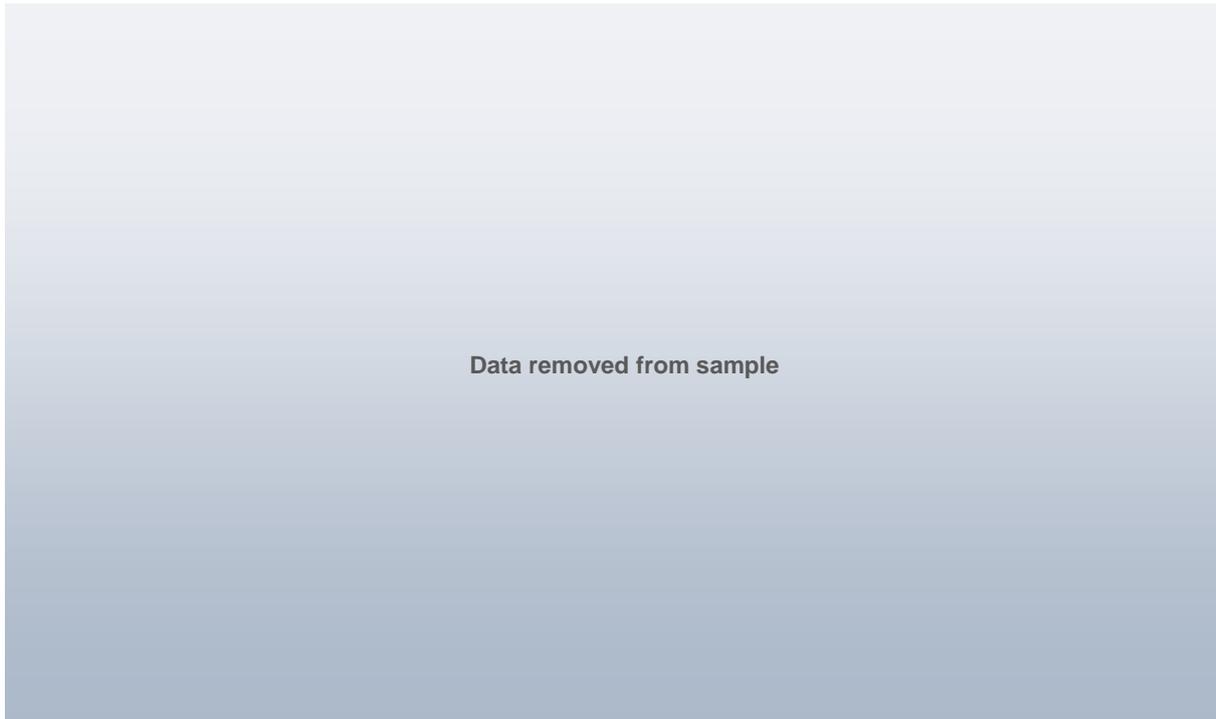
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

| % retail value rsp Brand (GBO) | Company (NBO) | 2020 | 2021 | 2022 | 2023 |
|-----------------------------------|---------------|------|------|------|------|
|-----------------------------------|---------------|------|------|------|------|

Data removed from sample



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

Table 14 Distribution of Beauty and Personal Care by Format: % Value 2018-2023

| % retail value rsp | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--|--------------------------|------|------|------|------|------|
| Retail Channels | Data removed from sample | | | | | |
| - Retail Offline | | | | | | |
| -- Grocery Retailers | | | | | | |
| --- Convenience Retail | | | | | | |
| ---- Convenience Stores | | | | | | |
| ---- Forecourt Retailers | | | | | | |
| --- Supermarkets | | | | | | |
| --- Hypermarkets | | | | | | |
| --- Discounters | | | | | | |
| --- Warehouse Clubs | | | | | | |
| --- Food/drink/tobacco specialists | | | | | | |
| --- Small Local Grocers | | | | | | |
| -- Non-Grocery Retailers | | | | | | |
| --- General Merchandise Stores | | | | | | |
| ---- Department Stores | | | | | | |
| ---- Variety Stores | | | | | | |
| --- Apparel and Footwear Specialists | | | | | | |
| --- Appliances and Electronics Specialists | | | | | | |
| --- Home Products Specialists | | | | | | |
| --- Health and Beauty | | | | | | |

- Specialists
- Beauty Specialists
- Pharmacies
- Optical Goods Stores
- Health and Personal Care Stores
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hair Salons
- Total

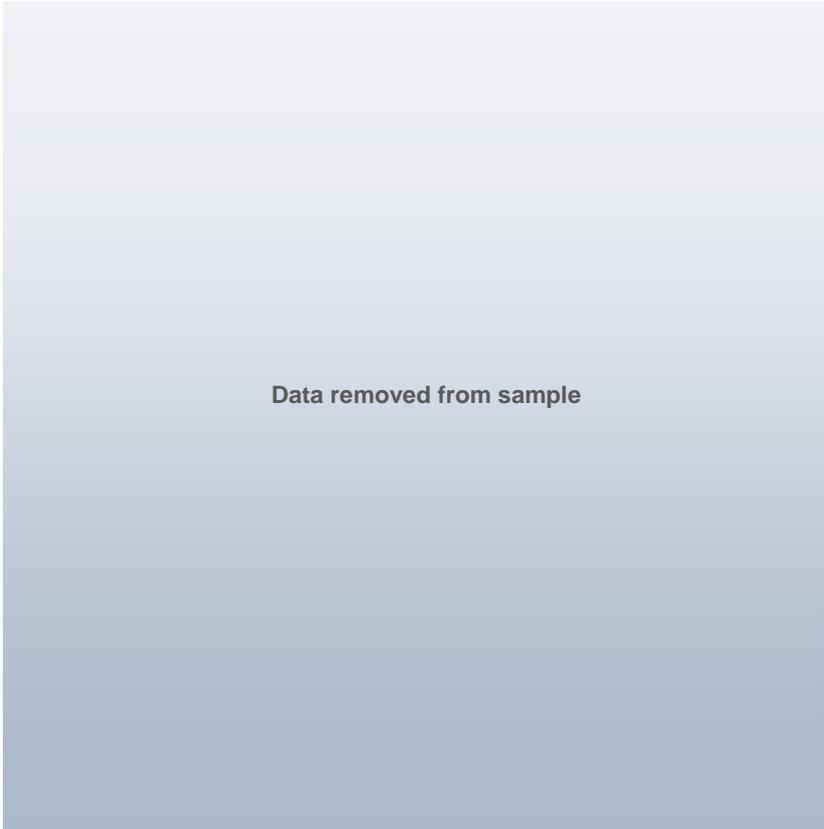


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Distribution of Beauty and Personal Care by Format and Category: % Value 2023

% retail value rsp

| | Baby and Child-specific Products | Bath and Shower | Colour Cosmetics | Deodorants | Depilatories | Fragrances |
|--|----------------------------------|-----------------|------------------|------------|--------------|------------|
| Retail Channels | | | | | | |
| - Retail Offline | | | | | | |
| -- Grocery Retailers | | | | | | |
| ---- Convenience Retail | | | | | | |
| ---- Convenience Stores | | | | | | |
| ---- Forecourt Retailers | | | | | | |
| --- Supermarkets | | | | | | |
| --- Hypermarkets | | | | | | |
| --- Discounters | | | | | | |
| --- Warehouse Clubs | | | | | | |
| --- Food/drink/tobacco specialists | | | | | | |
| --- Small Local Grocers | | | | | | |
| -- Non-Grocery Retailers | | | | | | |
| --- General Merchandise Stores | | | | | | |
| ---- Department Stores | | | | | | |
| ---- Variety Stores | | | | | | |
| --- Apparel and Footwear Specialists | | | | | | |
| --- Appliances and Electronics Specialists | | | | | | |
| --- Home Products Specialists | | | | | | |
| --- Health and Beauty Specialists | | | | | | |
| ---- Beauty Specialists | | | | | | |
| ---- Pharmacies | | | | | | |
| ---- Optical Goods Stores | | | | | | |
| ---- Health and | | | | | | |

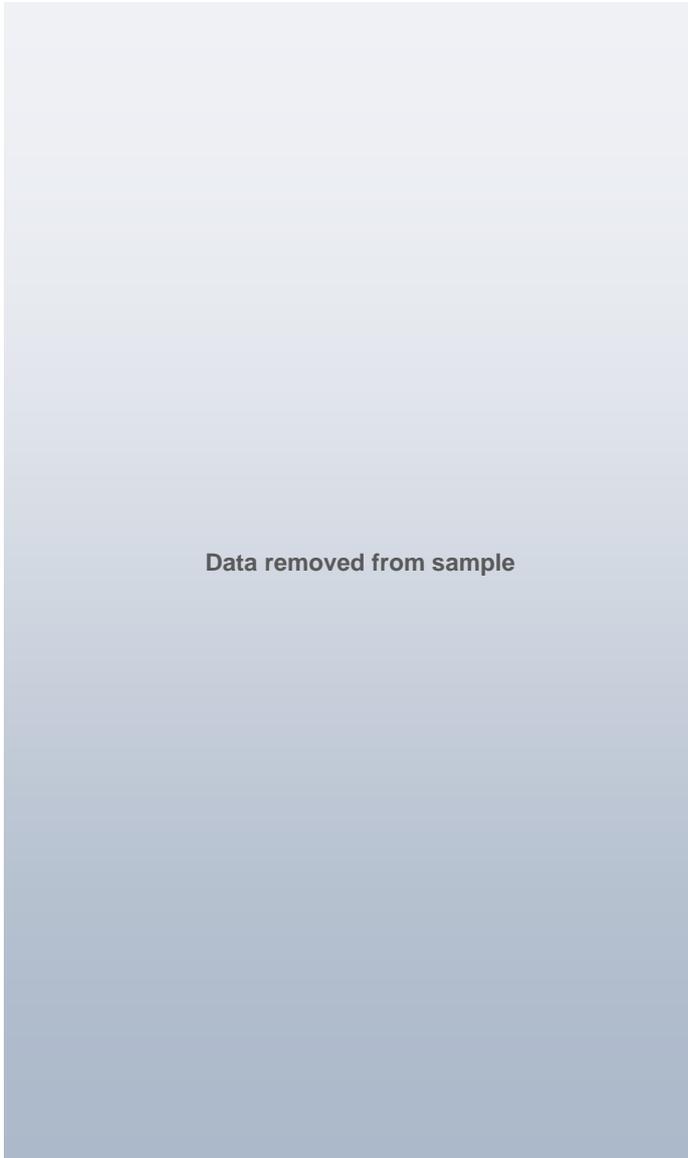


- Personal Care Stores
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hair Salons
- Total



Hair Care Men's Grooming Oral Care Skin Care Sun Care

- Retail Channels
- Retail Offline
- Grocery Retailers
- Convenience Retail
- Convenience Stores
- Forecourt Retailers
- Supermarkets
- Hypermarkets
- Discounters
- Warehouse Clubs
- Food/drink/tobacco specialists
- Small Local Grocers
- Non-Grocery Retailers
- General Merchandise Stores
- Department Stores
- Variety Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Beauty Specialists
- Pharmacies
- Optical Goods Stores
- Health and Personal Care Stores
- Leisure and Personal Goods Specialists
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Non-retail channels
- Hair Salons
- Total



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

Key: BC = baby and child-specific products; BS = bath and shower; CC = colour cosmetics; DO = deodorants; DP = depilatories; FR = fragrances; HC = hair care; MG = men's grooming; OC = oral care; SK = skin care; SU = sun care

Table 16 Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

| INR million | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|---|---------------------------------|------|------|------|------|------|
| Beauty and Personal Care | Data removed from sample | | | | | |
| Baby and Child-specific Products | | | | | | |
| Bath and Shower | | | | | | |
| Colour Cosmetics | | | | | | |
| Deodorants | | | | | | |
| Depilatories | | | | | | |
| Fragrances | | | | | | |
| Hair Care | | | | | | |
| Men's Grooming | | | | | | |
| Oral Care | | | | | | |
| Oral Care Excl Power Toothbrushes | | | | | | |
| Skin Care | | | | | | |
| Sun Care | | | | | | |
| Premium Beauty and Personal Care | | | | | | |
| Prestige Beauty and Personal Care | | | | | | |
| Mass Beauty and Personal Care | | | | | | |
| Dermocosmetics Beauty and Personal Care | | | | | | |

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

Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care

Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

Table 17 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

| % constant value growth | 2023/2024 | 2023-28 CAGR | 2023/28 Total |
|-----------------------------------|---------------------------------|--------------|---------------|
| Beauty and Personal Care | Data removed from sample | | |
| Baby and Child-specific Products | | | |
| Bath and Shower | | | |
| Colour Cosmetics | | | |
| Deodorants | | | |
| Depilatories | | | |
| Fragrances | | | |
| Hair Care | | | |
| Men's Grooming | | | |
| Oral Care | | | |
| Oral Care Excl Power Toothbrushes | | | |
| Skin Care | | | |

Sun Care
 Premium Beauty and Personal Care
 Prestige Beauty and Personal Care
 Mass Beauty and Personal Care
 Dermocosmetics Beauty and Personal Care

Data removed from sample

- Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
- Note 1: Prestige/premium/mass beauty and personal care sales are additionally included within baby and child-specific products, bath and shower, colour cosmetics, deodorants, fragrances, hair care, skin care and sun care
- Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances and baby and child-specific sun care categories

DISCLAIMER

Forecast and scenario closing date: 8 April 2024

Report closing date: 18 July 2024

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

| | |
|--------------------|------------------------------------|
| Official Sources | Content removed from sample |
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| Trade Associations | |
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| Trade Press | |

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Source: Euromonitor International