



Passport

Fragrances in India

Euromonitor International

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Some content and data have been
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FRAGRANCES IN INDIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

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

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

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Miniature fragrances gain popularity across the mass and premium segments

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PROSPECTS AND OPPORTUNITIES

Availability and accessibility of premium brands set to drive growth

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Content removed from sample

Impulse purchases via hyperlocal platforms to accentuate growth for mass fragrances

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

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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

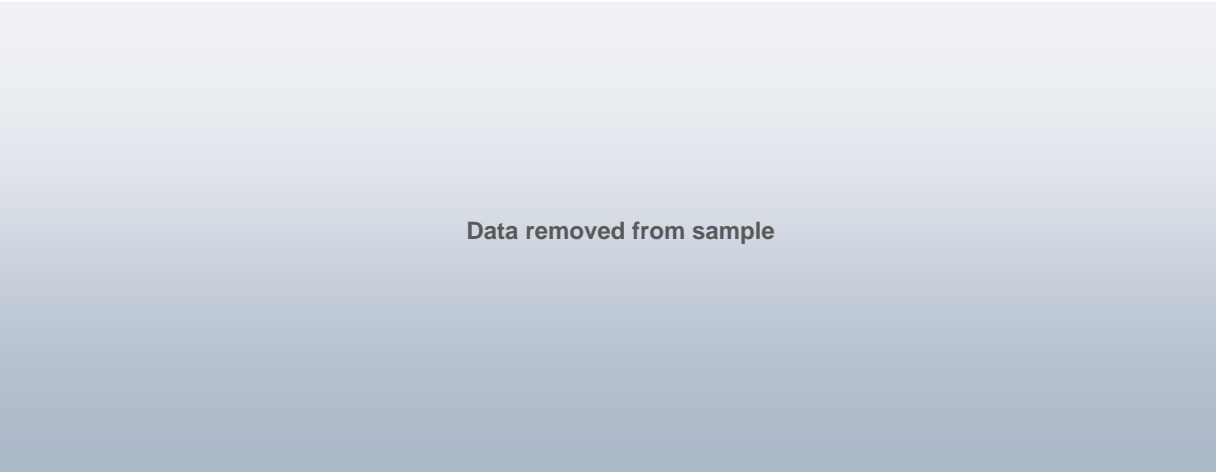
Table 2 Sales of Fragrances by Category: % Value Growth 2018-2023

% 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

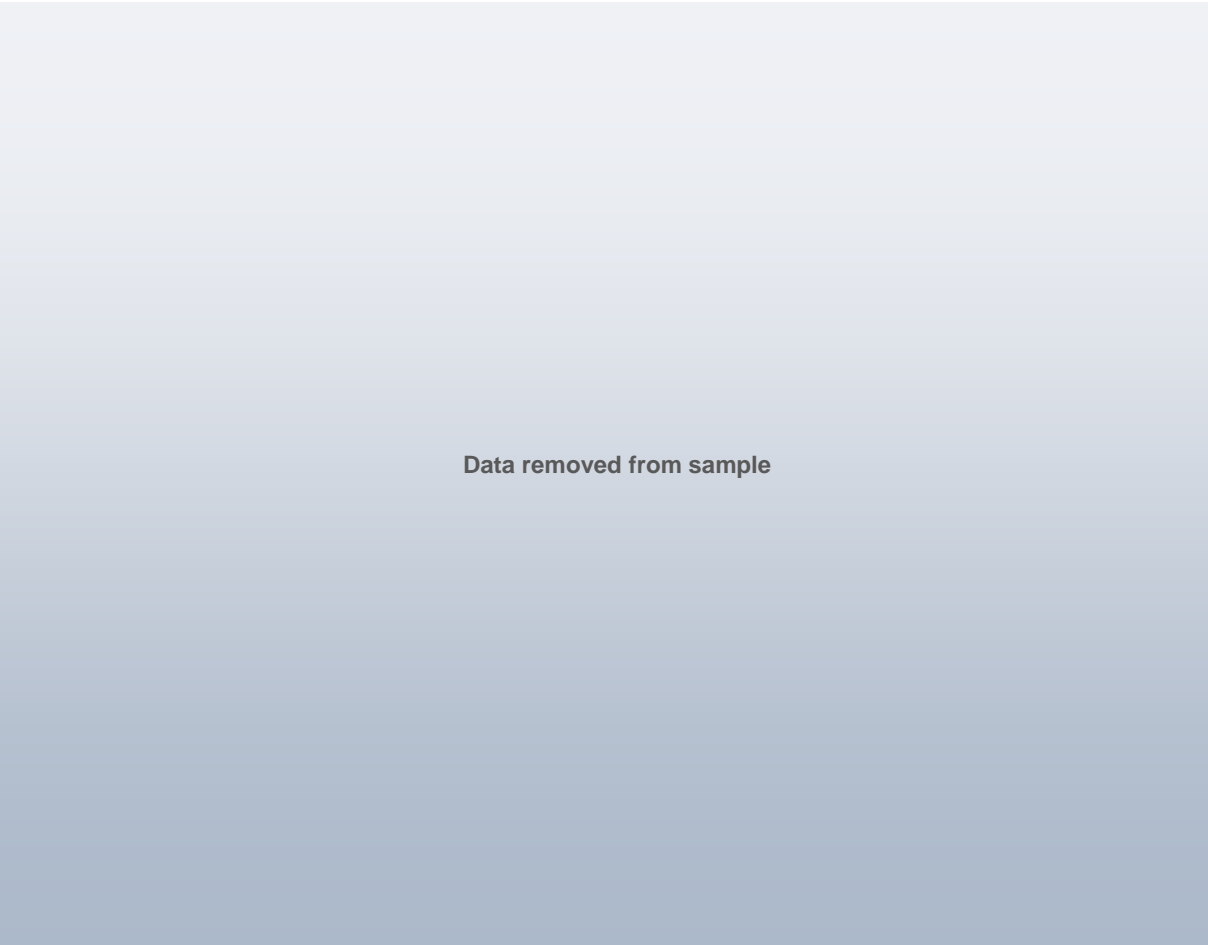
% retail value rsp Company	2019	2020	2021	2022	2023
	Data removed from sample				



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

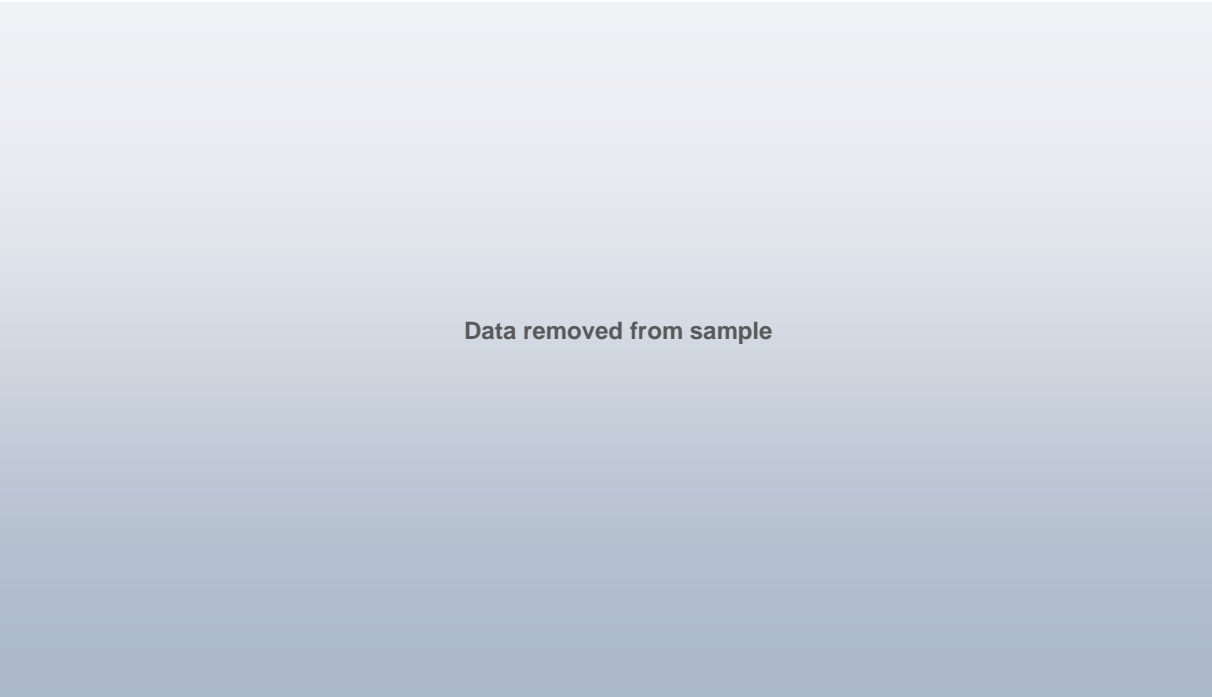
% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					



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
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					

- Mass Unisex Fragrances
- Mass Fragrance Sets/Kits

Data removed from sample

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

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2023 key trends

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Competitive landscape

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Retailing developments

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What next for beauty and personal care?

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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						

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 official statistics, trade associations, trade press, company research, store checks, 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 10 Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

Beauty and Personal Care
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 official statistics, trade associations, trade press, company research, store checks, 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

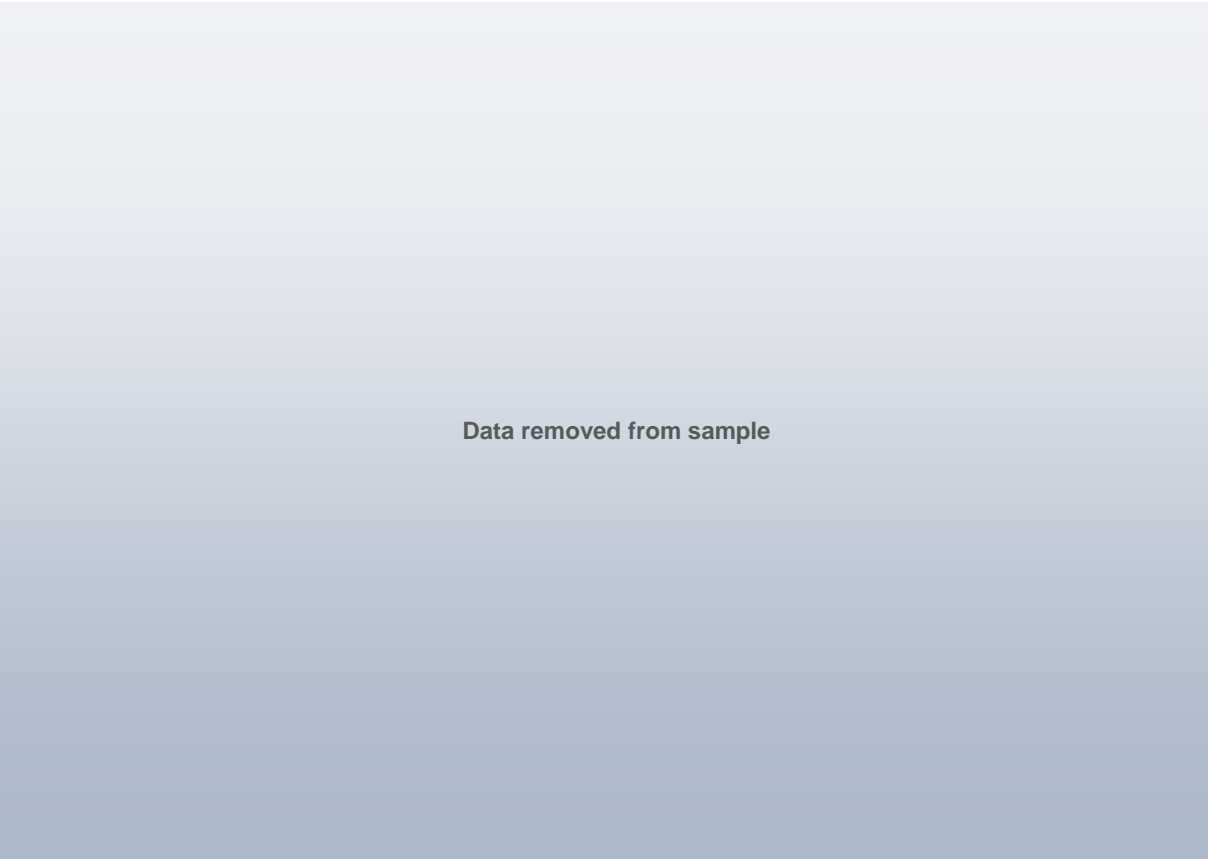
Note 2: Sum of categories is greater than market size because of double counting in men's bath and shower, men's deodorants, men's hair care, men's skin care, men's fragrances, and baby and child-specific sun care categories

Table 11 GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

% retail value rsp

Company 2019 2020 2021 2022 2023

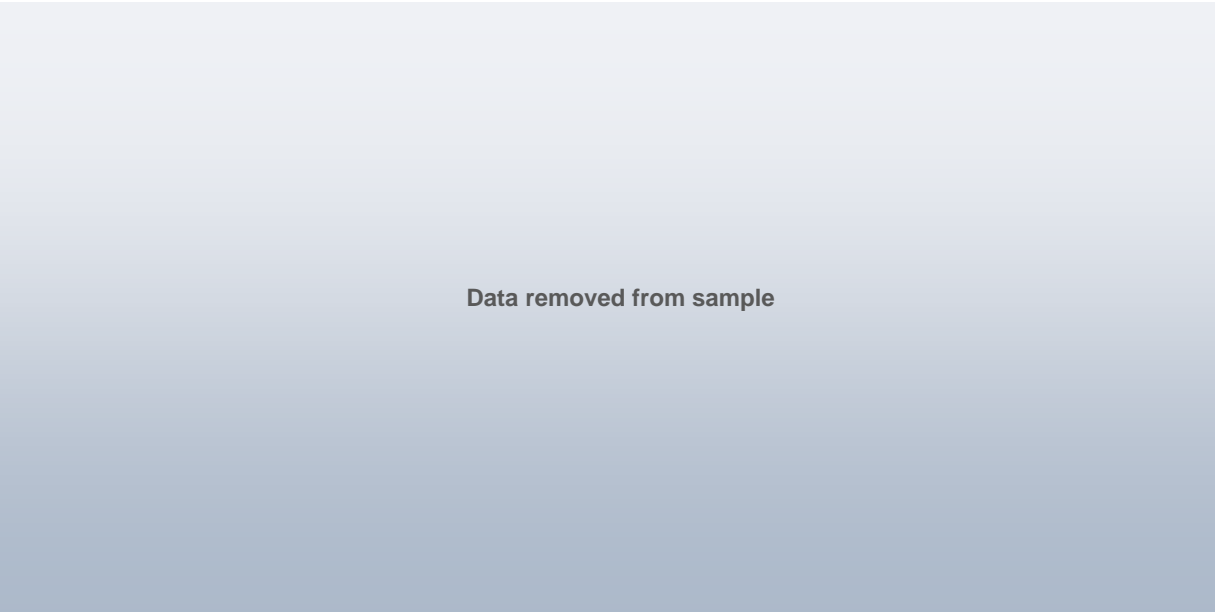
Data removed from sample



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

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

% retail value rsp Company	2019	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 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					

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

Data removed from sample

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

Data removed from sample

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

Data removed from sample

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

Data removed from sample

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

Trade Associations

Trade Press

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Content removed from sample



Source: Euromonitor International