



Euromonitor
International

Fragrances in Indonesia

May 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Fragrances Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Fragrances

INDUSTRY PERFORMANCE

Storytelling and Aspirational Self-Expression Drives Mass and Premium Fragrance Growth in 2025

Chart 2 - Strategic Storytelling and Partnerships Propel HMNS Products

AI and Digital Innovation Address the Blind-Buying Barrier to Strengthen Online Fragrance Purchasing

Chart 3 - Kahf Decode Brings AI-Powered Scent Personalisation with Robomix for a Unique Fragrance Experience

Atsiri Embeds Sustainability as a Holistic Lifestyle Narrative Rather Than a Packaging Claim

Chart 4 - Atsiri Champions Mindful Living Through Heritage Driven Fragrance and Sustainable Innovation

Chart 5 - Value Sales 2020-2030

Chart 6 - Volume Sales 2020-2030

Chart 7 - Value Sales by Category 2025

WHAT'S NEXT?

AI and AR are forecast to bridge physical and digital shopping through immersive, sensory-rich experiences

Hyper-personalisation and cultural narratives are set to deepen consumer connection and brand loyalty

Chinese brand entry is anticipated to intensify competition and reshape the fragrance landscape

Chart 8 - Analyst Insight for Fragrances

Chart 9 - Forecast Value Sales 2020-2030

Chart 10 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

L'Oréal maintains leadership as market fragmentation deepens and local brands gain ground

Kahf strengthens its position in mass men's fragrances through community-focused activations

Chart 11 - Company Shares 2025

Chart 12 - Brand Shares 2025

CHANNELS

Offline retail maintains dominance as local brands invest in immersive physical experiences

E-commerce expands rapidly, driven by hype-led launches and the growing role of social commerce

Chart 13 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 14 - Economic Context for Fragrances

Chart 15 - Real GDP Growth 2020-2030

Chart 16 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 17 - Consumer Context for Fragrances

Chart 18 - Population 2020-2030

Chart 19 - Consumer Expenditure 2020-2030

Chart 20 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 21 - Key Industry Trends for Beauty and Personal Care

INDUSTRY PERFORMANCE

Lifestyle Marketing and Community Engagement Drive Broad-Based Growth

Chart 22 - Paragon Leads With Community First Marketing via Kahf and Wardah

Barrier Protection Emerges as a Cross-Category Value Driver as Hybrid Formulations Redefine Expectations

Chart 23 - Barrier Protection Extended Beyond Skincare in 2025

Inclusive Ambassador Strategies Broaden Target Audiences

Chart 24 - Male Ambassador Strategy Expands Cross Gender Reach in Baby Care and Sun Care

Chart 25 - Value Sales 2020-2030

Chart 26 - Volume Sales 2020-2030

Chart 27 - Value Sales by Category 2025

WHAT'S NEXT?

Demand for Skin Care Benefits to Drive Formula Innovation and Blur Category Boundaries

Retail to Transform as Social Commerce Reshapes Discovery and Conversion

Emerging Consumer Groups and Educational Marketing to Unlock the Next Wave of Growth

Chart 28 - Analyst Insight for Beauty and Personal Care

Chart 29 - Forecast Value Sales 2020-2030

Chart 30 - Forecast Value Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Leading Companies Consolidate Positions Amid Strong Competition and Fragmentation

Emerging Niche Brands Gain Traction through Innovation and Targeted Marketing

Chart 31 - Company Shares 2025

Chart 32 - Brand Shares 2025

CHANNELS

Offline Retail Leads as Brand-Retailer Collaborations Elevate In-Store Experience

E-Commerce Serves as Both a Sales Engine and Digital Marketing Amplifier

Chart 33 - Retail Channels 2020-2025

ECONOMIC CONTEXT

Chart 34 - Economic Context for Beauty and Personal Care

Chart 35 - Real Gdp Growth 2020-2030

Chart 36 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 37 - Consumer Context for Beauty and Personal Care

Chart 38 - Population 2020-2030

Chart 39 - Consumer Expenditure 2020-2030

Chart 40 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/fragrances-in-indonesia/report.