

Gulf Cooperation Council Fragrance and Perfumes - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Gulf Cooperation Council Fragrance and Perfumes Market size is estimated at USD 3.23 billion in 2025, and is expected to reach USD 3.85 billion by 2030, at a CAGR of 3.58% during the forecast period (2025-2030).

The Gulf Cooperation Council region has an intense passion and a rich history for fragrances and premium perfumery that encompasses tradition, research, and creativity. The area has various scents ranging from fruity to floral aromas. Along with this, the consumers in the region signify that such fresh fragrances help elevate and alter the mood. Furthermore, among middle eastern people, scents form an integral part of the traditional and cultural heritage. Moreover, the rising popularity of lighter-scented products, especially among the millennial population, and affordable body splashes and body mists are expected to boost the sales of fragrance and perfume products in the Middle Eastern region.

Over the long term, the increasing disposable income of Arabian consumers has raised the consumer's affordability towards premium categories of different fragrances and perfumes. This has led manufacturers to launch more innovative and excellent fragrances by blending oriental scents lost in time with European signatures. For instance, in March 2022, Lecmo, a premium perfume brand in the United Arab Emirates, launched its new collection called 'The Blue.'

However, the availability of counterfeit products and the use of chemical ingredients with possible side effects are anticipated to restrain the growth of the perfume and fragrances market.

GCC Perfume and Fragrance Market Trends

Increasing Demand for Premium Fragrances

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

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The Middle East is one of the dominating regions for the fragrance and perfume market owing to the Arabian consumer's passion for fine fragrances. Moreover, the globally leading fragrance manufacturers are taking inspiration from the region to innovate more premium products that can act as a potential future trend in the fragrances and perfumes markets. Meanwhile, in the Gulf Cooperation Council region, the disposable income of the consumers is high, which propelled the demand for perfume or scents as they can afford premium categories of different fragrances and perfumes, which has accelerated the excellent quality over the regions. For instance, the annual consumer spending of UAE consumers reached USD 140.39 billion in 2020, as per World bank data. In addition, manufacturers operating in the segment are also innovating products that inculcate fragrances with natural essences, which are perceived to be safer and have therapeutic properties compared to their synthetic variants. On the other hand, the population in the Gulf Cooperation Council region pursues Islamic beliefs, and producers of scents or perfume have started making fragrances and perfumes per the halal market with regulations, which has influenced the market in the premium segment.

Saudi Arabia Leads the Fragrances & Perfume Market

Saudi Arabia portrays a comprehensible dominance in the Gulf Cooperation Council fragrance and perfumes market due to rising disposable income associated with increasing consumer spending on personal care products. For instance, according to the Saudi Arabian Monetary Agency, consumer spending in the country has increased to USD 83,916.1 million in the first half of 2021 from USD 80,067.9 million in the final quarter of 2020. Furthermore, several companies lead the dominance with designated and innovative product lines creating a range of customized perfumes and traditional all-natural scents. Furthermore, the country has thriving tourism that deals with a significant number of ex-pats and immigrants and a growing e-commerce industry that has enabled brands to reach out to more niche consumers. For instance, in 2021, the ex-pat population reached 13.49 million as per the data published by the General Authority of Statistics Kingdom of Saudi Arabia. Overall, an increasing expenditure capacity of consumers in Saudi Arabia is a positive influencer in the market growth. Apart from this, the presence of duty-free sales counters at international airports in the region is also encouraging and populating the exports of fragrances to other countries, mainly as a part of the gifting tradition. Moreover, New Brands such as Odicit, Amouage, and Arcadia offers a range of traditional fragrances that come under typical transparent and unnamed bottles and are allowed to be mixed in-store to create a personalized scent, which is often recognized as ways to brand and market their products. Additionally, the global players are also focused on launching innovative fragrance products to retain their market position. For instance, in November 2021, Dior launched Dior's Beauty Sauvage, a range of new men's fragrances against the heritage backdrop of Saudi Arabia's Al Ula.

GCC Perfume and Fragrance Industry Overview

The Gulf Cooperation Council Fragrance and Perfumes Market are highly competitive with various significant players like LVMH, Kering Holland NV, Diptyque, Rasasi, Yas Perfumes, and others. With increased industry regulation worldwide, the launching of new products, mergers, and acquisitions has also increased, which is the primary cause of acquiring a considerable network market share. Manufacturers operate in the region, complying with regional and international standards that enable them to stand out in the perfumery industry. Advanced distribution networks and manufacturing expertise give an upper edge to the manufacturers to expand their range of products worldwide.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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