

—— 2024 ——

Hong Kong and Macau Perfume and Home Fragrance White Paper

港澳地區香水及家居香氛市場發展趨勢白皮書

穎通集團
ETERNAL GROUP

INSTAGRAM



LINKEDIN



—— 2024 ——

Hong Kong and Macau Perfume and Home Fragrance White Paper
港澳地區香水及家居香氛市場發展趨勢白皮書

Contents

目錄

1. 前言 Introduction	3	4. 市場機遇與挑戰 Opportunities and Challenges Facing the Fragrance Market	25
2. 市場概況 Market Overview	5	5. 受訪者基本資料 Profile Insights: Backgrounds of Interview Participants	31
3. 消費者行為分析 Consumer Behavior Analysis	7	6. 總結 Conclusion	33
3.1 日常生活主要消費類別 Key Categories of Consumption in Daily Life	8	7. 鳴謝 Acknowledgements	34
3.2 日常使用香水的習慣與偏好 Daily Perfume Usage: Habits and Preferences	9	8. 參考資料 References	35
3.3 香水選擇因素及偏好類型 Key Factors in Perfume Selection Preferences	11		
3.4 香水噴灑位置及其對使用者感受的影響 Perfume Application Locations on User Experience	13		
3.5 購買香水及家居香氛產品的考慮因素及信息獲取渠道 Considerations and Channels For Obtaining Information on Purchasing Perfume and Home Fragrance Products	15		
3.6 香水及家居香氛產品購買渠道、頻率及價格接受度 Purchasing Channels, Frequency, and Price Acceptance for Perfume and Home Fragrance Products	17		
3.7 香水品牌選擇趨勢 Trends in Brand Preferences for Perfume	20		
3.8 家居香氛的使用習慣、產品偏好及對使用者感受的影響 Home Fragrance Usage: Habits, Preferences and the Influence on User Experience	22		

1. 前言 INTRODUCTION

隨著香港和澳門地區消費市場的日益成熟，消費者對香水及家居香氛產品的需求不斷升級。消費者不僅重視產品的功能性，還愈加關注香水的獨特性和個性化體驗。在激烈的市場競爭中，許多新興的小眾香水品牌和家居香氛產品相繼出現，獨特的調香風格和個性化設計能更好地滿足細分市場的特殊需要，反映了消費者對產品多元化的持續追求。

為全面了解港澳香水及家居香氛市場發展趨勢和消費者偏好，國際香氛協會於2024年9月期間展開了一項調查研究，收集並分析了1063名受訪者的使用習慣。該研究旨在為行業企業提供有價值的市場洞察，幫助其制定更符合消費者需求的產品和營銷策略，並深入探討港澳香水及家居香氛市場的發展趨勢、消費者偏好及行業競爭，以便相關業者更好地把握市場動態。

As the consumer market in Hong Kong and Macau matures, the demand for perfumes and home fragrance products continues to evolve. Consumers are increasingly focused not only on the functionality of products but also on the uniqueness and personalized experiences offered by fragrances. Amid fierce market competition, many emerging niche perfume brands and home fragrance products have emerged, offering distinctive scent profiles and personalized designs that better meet the specific needs of segmented markets, reflecting consumers' ongoing pursuit of product diversity.

To comprehensively understand the development trends of the Hong Kong and Macau perfume and home fragrance market, as well as consumer usage patterns, the International Fragrance Association conducted a survey in September 2024, collecting and analyzing data from 1,063 respondents regarding their usage habits and preferences. This research aims to provide valuable market insights for industry enterprises, helping them develop products and marketing strategies that better align with consumer needs, while exploring the development trends, consumer preferences, and market opportunities in the Hong Kong and Macau perfume and home fragrance market, enabling relevant industries to better grasp market dynamics.

2. 市場概況 MARKET OVERVIEW

香港的經濟市場在2024年上半年展現出適度的增長潛力，主要受到「溫和復甦」階段的影響。政府的支持性財政政策以及逐步放寬的COVID-19限制為經濟增長提供了堅實的基礎。

根據2024年上半年的數據，香港的本地生產總值在第二季度按年增長了3.3%；澳門在2024年上半年錄得2042.7億澳門元的本地生產總值，顯示出15.7%的顯著增長。羅兵咸永道的預測顯示，香港的零售銷售預計在2024年將增長約5%，達到約4280億港元。展望下半年，預期零售銷售將有更明顯的復甦，尤其是在百貨公司商品、藥品、化妝品及奢侈品等類別上。

這些數據顯示出消費者信心的逐步恢復，市場活力隨之提升，特別是在奢侈品領域，對高端香水和家居香氛產品的需求持續增長。

Hong Kong's economic market demonstrated moderate growth potential in the first half of 2024, primarily influenced by a phase of "moderate recovery." Supportive fiscal policies from the government and the gradual easing of COVID-19 restrictions provided a solid foundation for economic growth.

According to data from the first half of 2024, Hong Kong's gross domestic product grew by 3.3% year-on-year in the second quarter, while Macau recorded a GDP of 204.27 billion patacas in the first half of 2024, reflecting a significant increase of 15.7%. PwC Hong Kong forecasts indicate that Hong Kong's retail sales are expected to grow by approximately 5% in 2024, reaching about HK\$428 billion. Looking ahead to the second half of the year, a more pronounced recovery in retail sales is anticipated, particularly in the categories of department store goods, pharmaceuticals, cosmetics, and luxury products.

These figures indicate a gradual restoration of consumer confidence and an increase in market vitality, especially in the luxury goods sector, where there is sustained demand for high-end perfumes and home fragrance products.

3.

消費者行為分析

CONSUMER BEHAVIOR ANALYSIS

一項有關香港及澳門地區在2024年上半年度「香水及家居香氛產品使用」的調查研究。從2024年9月份開始，在網上採用問卷調查方法數據蒐集，為期約兩星期，成功回收1063份問卷。這次調查旨在深入探討港澳地區消費者的使用習慣和消費偏好，同時關注近年興起的小眾品牌及家居香氛產品在市場的表現。

A survey on the "Use of Perfumes and Home Fragrance Products" in Hong Kong and Macau during the first half of 2024. Starting in September 2024, an online questionnaire method was used for data collection over approximately two weeks, successfully retrieving 1,063 responses. The survey aims to delve into the usage habits and consumption preferences of consumers in the region while focusing on the performance of emerging niche perfume brands and home fragrance products in the market.

3.1

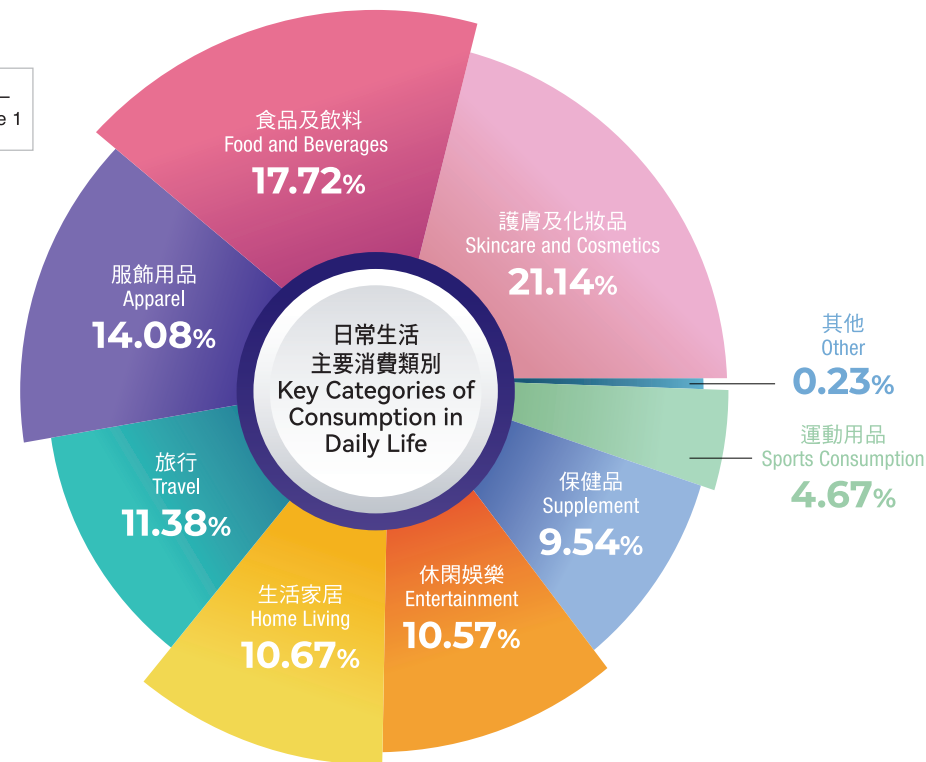
日常生活主要消費類別

Key Categories of Consumption in Daily Life

在日常生活主要消費類別中，護膚及化妝品佔21.14%，為最主要的消費項目，顯示消費者對個人護理和美容產品的重視。食品及飲料和服飾用品分別佔17.72%和14.08%。此外，旅行和生活家居的消費比例分別為11.38%和10.67%，反映出消費者對生活品質和休閒體驗的需求。休閒娛樂和保健品的比例分別為10.57%和9.54%，顯示消費者對健康和娛樂活動的關注，而運動用品佔4.67%（見表一）。

In the main consumption categories of daily life, skincare and cosmetics accounted for 21.14%, making it the most significant consumption item, highlighting consumers' emphasis on personal care and beauty products. Food and beverages and apparel accounted for 17.72% and 14.08%, respectively. Additionally, consumption in travel and home living was 11.38% and 10.67%, reflecting consumers' demand for quality of life and leisure experiences. Leisure entertainment and health products accounted for 10.57% and 9.54%, indicating consumers' focus on health and entertainment activities, while sporting goods made up 4.67% (see Table 1).

表一
Table 1



3.2

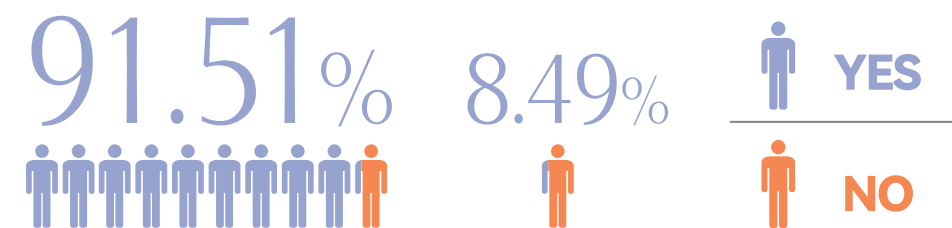
日常使用香水的習慣與偏好 Daily Perfume Usage: Habits and Preferences

91.51%的受訪者表示有使用香水的習慣，而8.49%則表示沒有（見表二）。在使用香水的受訪者中，60.46%會根據心情、場合或季節選擇多款香水；21.57%日常使用同一款香水，特別場合則使用另一款；而17.97%則通常使用同一款香水（見表三）。

91.51% of respondents indicated that they have a habit of using perfume, while 8.49% reported they do not (see Table 2). Among those who use perfume, 60.46% choose different perfumes based on mood, occasion, or season; 21.57% use the same perfume daily but switch for special occasions; and 17.97% typically use the same fragrance (see Table 3).

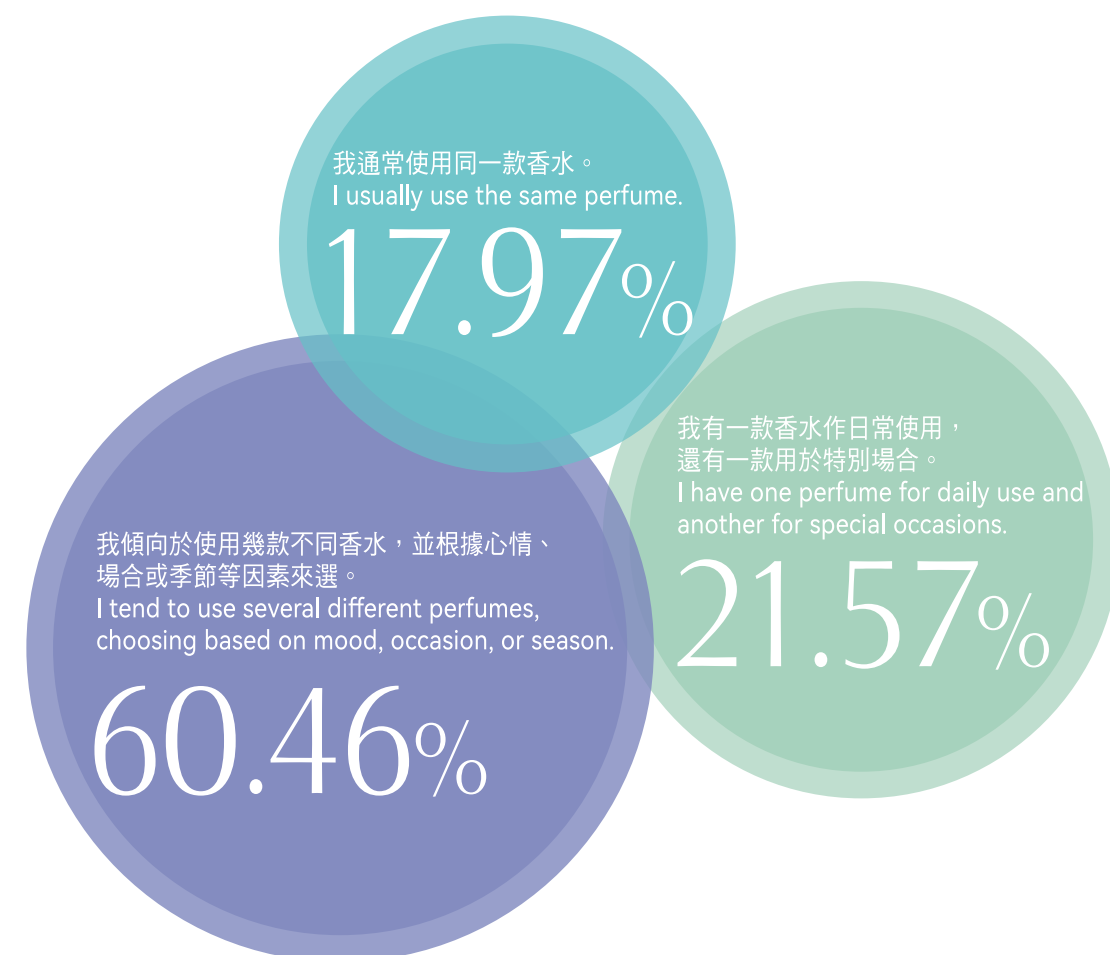
表二
Table 2

香水的使用習慣 Perfume Usage Habits



表三
Table 3

香水使用偏好 Perfume Usage Preferences



3.3

香水選擇因素及偏好類型 Key Factors and Preferences in Perfume Selection

關於香水的選擇考慮因素，受訪者的反饋顯示，35.62%的人會根據當天的心情來選擇香水，而31.56%則考慮不同場合的需求，16.45%受訪者基於季節性因素做出選擇，另有16.38%的人提到其他考量因素（見表四）。

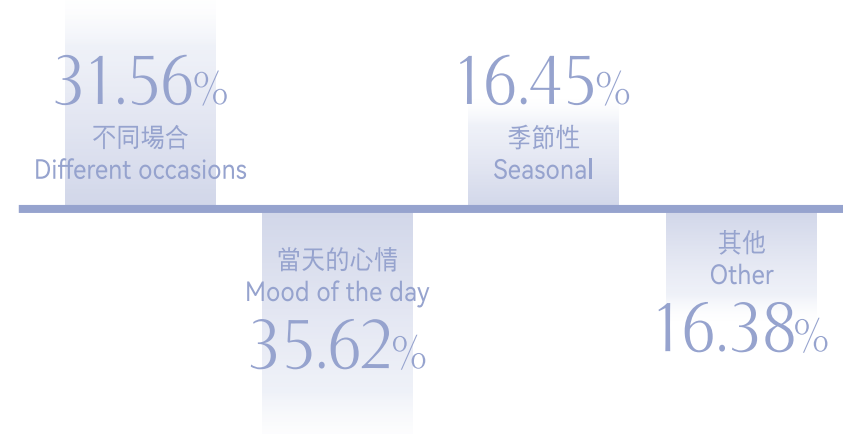
在喜歡的香水類型方面，48.19%的受訪者偏好花香調，成為最受歡迎的選擇。其次是木質香調，佔21%；果香調和柑橘香調分別為14.95%和11.21%。東方香調和皮革香調的喜好度較低，僅為2.19%和0.77%（見表五）。這些數據顯示，花香調在香水選擇中占據主導地位。

Regarding factors influencing perfume selection, 35.62% of respondents indicated that they choose perfumes based on their mood that day, while 31.56% consider the needs of different occasions, and 16.45% make selections based on seasonal factors. Another 16.38% mentioned other considerations (see Table 4).

In terms of preferred types of perfume, 48.19% of respondents favored floral scents, making it the most popular choice. This was followed by woody scents at 21%, fruity scents at 14.95%, and citrus scents at 11.21%. Oriental and leather scents were less favored, at only 2.19% and 0.77%, respectively (see Table 5), indicating that floral scents dominate perfume selection.

表四
Table 4

選擇香水的考慮因素
Considerations in Perfume Selection



表五
Table 5

喜歡的香水類型
Preferences in Perfume Selection



3.4

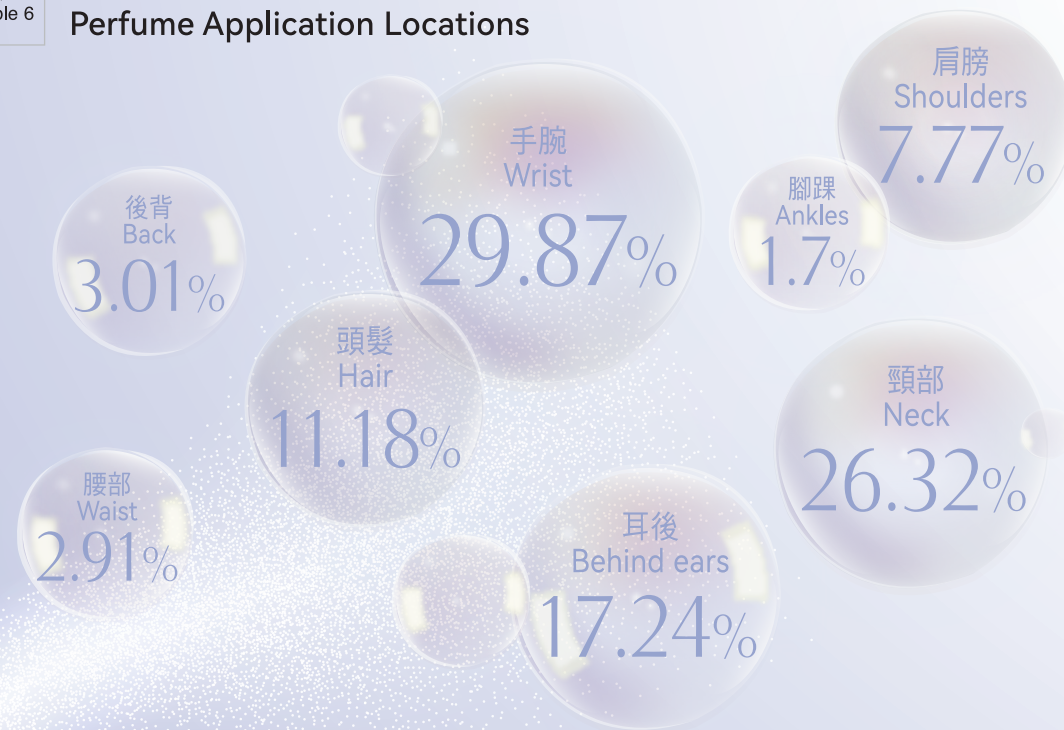
香水噴灑位置及其對使用者感受的影響 Perfume Application Locations on User Experience

手腕（29.87%）和頸部（26.32%）是最常見的噴香水位置（見表六）。噴灑香水後，31.54%的受訪者感到身心舒緩，22.54%的受訪者認為增強了自信，這表明香水在提升個人形象和社交互動中具有重要作用（見表七）。

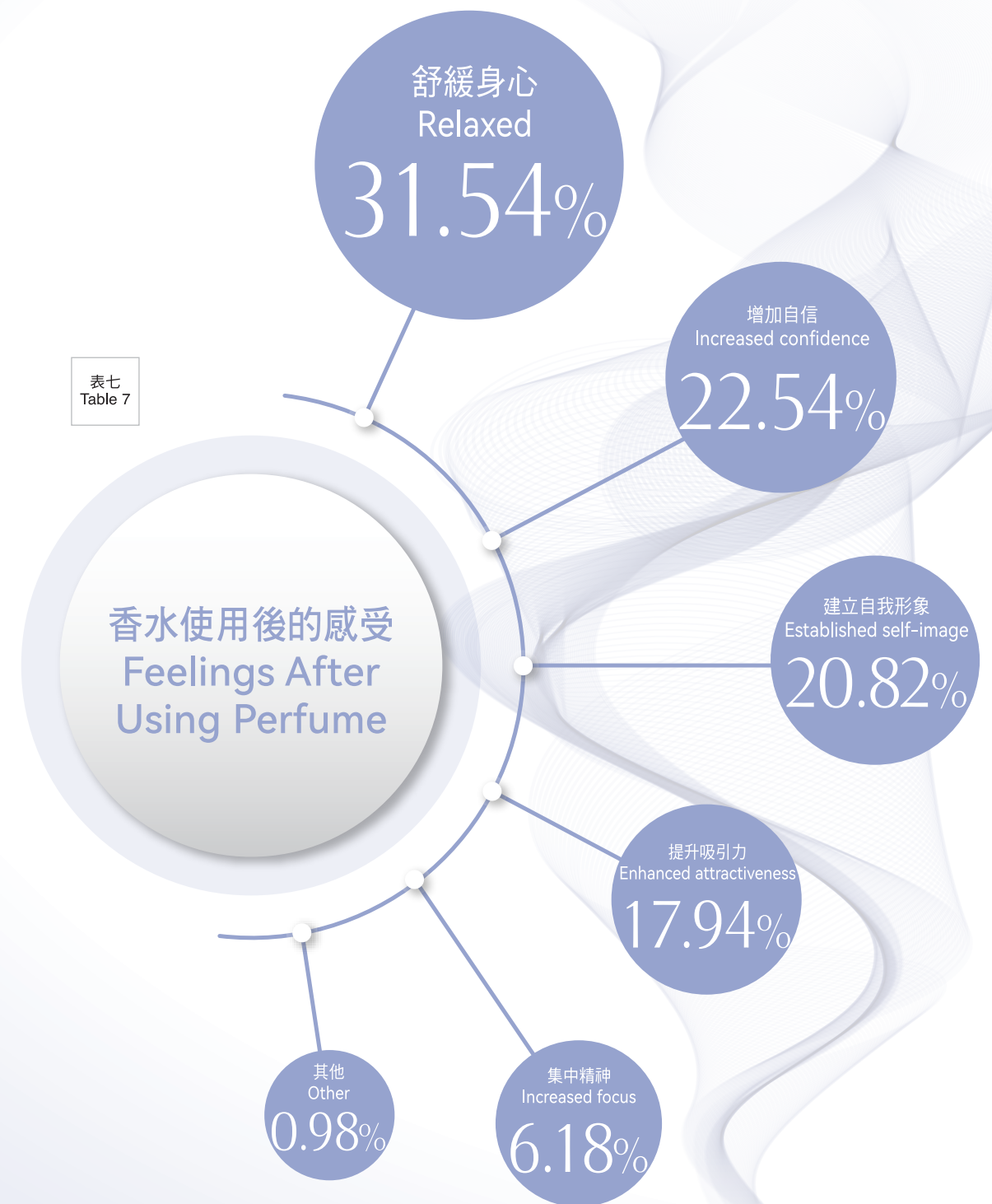
Wrist (29.87%) and neck (26.32%) are the most common locations for applying perfume (see table 6). After applying perfume, 31.54% of respondents felt relaxed, and 22.54% felt more confident, indicating the important role of perfume in enhancing personal image and social interaction (see Table 7).

表六
Table 6

香水噴灑位置
Perfume Application Locations



表七
Table 7



3.5

購買香水及家居香氛產品的考慮因素及信息獲取渠道 Considerations and Channels For Obtaining Information on Purchasing Perfume and Home Fragrance Products

香氣是影響購買決策的最重要因素，佔比31.2%，顯示受訪者在選擇產品時對氣味的重視程度。價格（21.13%）和符合個人風格（14.72%）亦是重要考量，表明消費者在尋找香水及家居香氛產品時希望能夠反映其個人形象（見表八）。

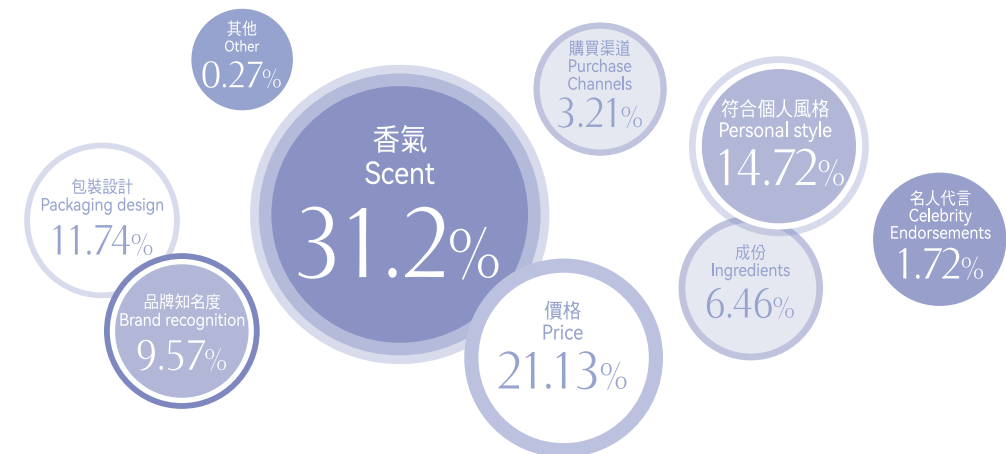
在信息獲取方面，社交媒體是最主要的渠道，佔38.07%，這反映了當前數位化環境下，受訪者對線上平台的依賴性增強。互聯網（25.91%）和朋友及家人的推薦（16.83%）同樣在提供產品信息中扮演了重要角色，顯示出社交影響力的存在（見表九）。

Scent is the most important factor influencing purchasing decisions, accounting for 31.2%, indicating the significance of scent in product selection. Price (21.13%) and alignment with personal style (14.72%) are also crucial considerations, reflecting consumers' desire for products that represent their personal image (see Table 8).

In terms of information channels, social media is the primary source, accounting for 38.07%. This reflects the increased reliance on online platforms in the current digital environment. The internet (25.91%) and recommendations from friends and family (16.83%) also play significant roles in providing product information, highlighting the influence of social dynamics (see Table 9).

表八
Table 8

購買香水及家居香氛產品時的考慮因素
Influential Factors in Purchasing Decisions for Perfume and Home Fragrance Products



表九
Table 9



3.6

香水及家居香氛產品購買渠道、頻率及價格接受度 Purchasing Channels, Frequency, and Price Acceptance in Perfume and Home Fragrance Product

實體分店品牌是最受歡迎的購買渠道，佔33.27%，而網上購物平台和百貨公司則分別占19.66%和19.1%。這表明消費者仍然重視實體店所提供的產品體驗和即時購買的便利性（見表十）。

在購買頻率方面，68.81%的受訪者在過去12個月內購買香水及家居香氛產品的次數為1至2次，反映出消費者對香水的選擇具有持久性；10.95%的受訪者表示購買3至5次，11.6%的受訪者購買6次或以上（見表十一）。用途方面，自用的比例為65%，而送禮佔20.29%，顯示出香水及家居香氛產品在特定場合（如節日或生日）作為禮物的功能（見表十二）。

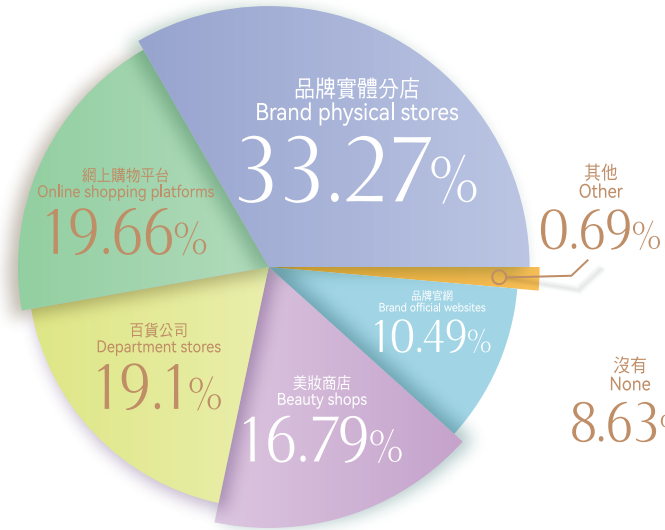
在價格接受度方面，46.13%的受訪者表示可接受的價格範圍為501至1,000港元，反映出消費者對中高價位香水的認可，顯示他們對於品質和品牌的重視（見表十三）。對於家居香氛產品，61.05%的受訪者表示可接受的價格範圍為100至500港元；29.79%的受訪者可接受的價格範圍為501至1,000港元（見表十四）。

Physical brand stores are the most popular purchasing channel, accounting for 33.27%, while online shopping platforms and department stores account for 19.66% and 19.1%, respectively. This indicates that consumers still value the product experience and immediacy offered by physical stores (see Table 10).

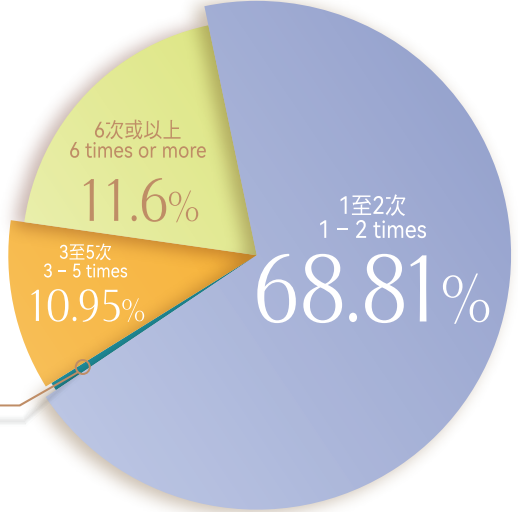
In terms of purchase frequency, 68.81% of respondents reported purchasing perfume and home fragrance product 1 to 2 times in the past 12 months, reflecting the lasting nature of consumers' choices; 10.95% purchased 3 to 5 times, and 11.6% purchased 6 times or more (see Table 11). For usage purposes, 65% reported purchasing perfumes and home fragrance products for themselves, while 20.29% indicated purchasing them as gifts, demonstrating the role of perfumes and home fragrance products as gifts for special occasions, e.g., holidays or birthdays (see Table 12).

Regarding price acceptance, 46.13% of respondents indicated that the acceptable price range is HK\$501 to HK\$1,000, reflecting consumers' recognition of mid-to-high-priced perfumes, showing their emphasis on quality and brand (see Table 13). Meanwhile, for home fragrance products, 61.05% of respondents stated that they consider the acceptable price range to be between HK\$100 and HK\$500, while 29.79% are willing to accept a price range of HK\$501 to HK\$1,000 (see Table 14).

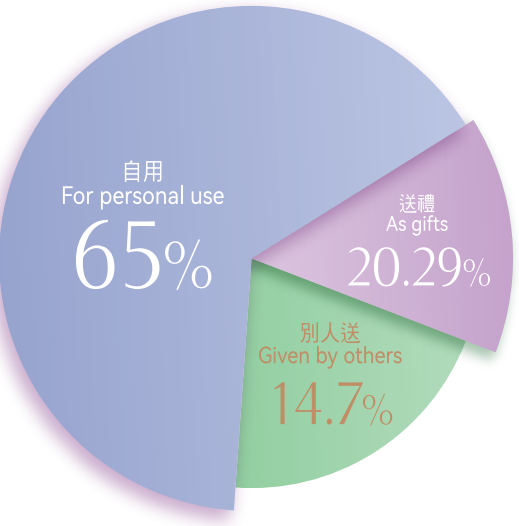
表十
Table 10
香水及家居香氛產品購買渠道
Channels for Purchasing Perfumes
and Home Fragrance Products



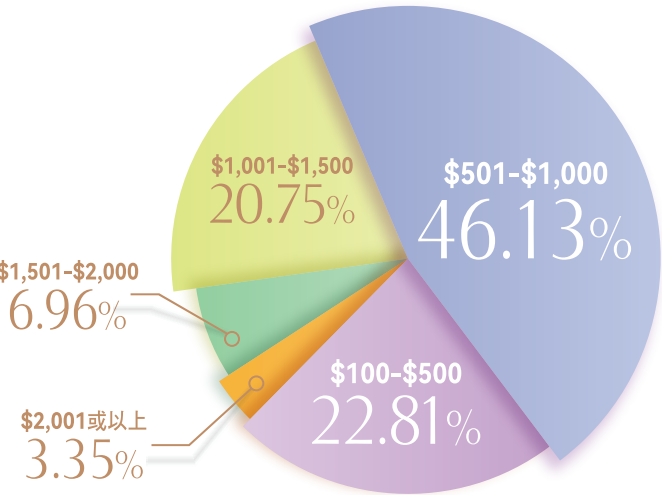
表十一
Table 11
過去12個月購買香水及
家居香氛產品的次數
Purchase Frequency
in the Past 12 Months



表十二
Table 12
購買香水及家居香氛產品的用途
Purpose for Purchasing Perfumes
and Home Fragrance Products

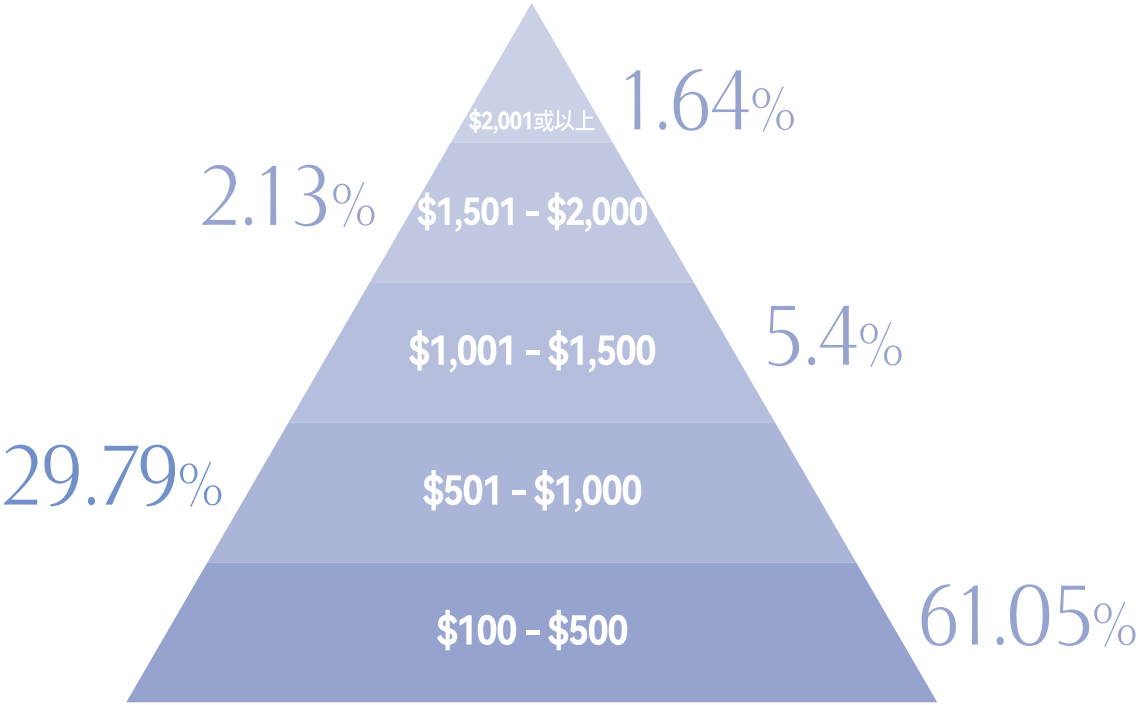


表十三
Table 13
香水價格接受度（港元）
Price Acceptance of
Perfumes (HKD)



表十四
Table 14

家居室內香氛價格接受度（港元）
Price Acceptance of
Home Fragrance Products (HKD)



3.7

香水品牌選擇趨勢 Trends in Perfume Brand Selection

受訪者所使用的香水品牌顯示出明顯的多樣性，Christian Dior排名第一，其次為Chanel和Jo Malone London，這突顯了這些品牌在消費者心中的地位與認可度。此外，在前五大品牌中，奢侈品牌佔據了四個名額，顯示出消費者對高端香水的持續偏好（見表十五）。

在首20個香水品牌排名中，小眾品牌佔有6個，分別是Diptyque、Byredo、Le Labo、Clean、Penhaligon's和Memo Paris。這些小眾品牌的出現反映消費者對獨特性和個性化的追求，並顯示了他們對品牌故事、成分和香氣的重視（見表十五）。

受訪者對於嘗試小眾品牌的意願相當高，在1063位受訪者中，有95.05%表示願意嘗試小眾品牌的香水和家居香氛產品，而僅有4.95%的人表示不會。這結果顯示出消費者對小眾品牌的廣泛接受，反映了市場中對獨特性和個性化香氛的持續需求，並突顯了小眾品牌在香水市場中的潛在發展機會（見表十六）。

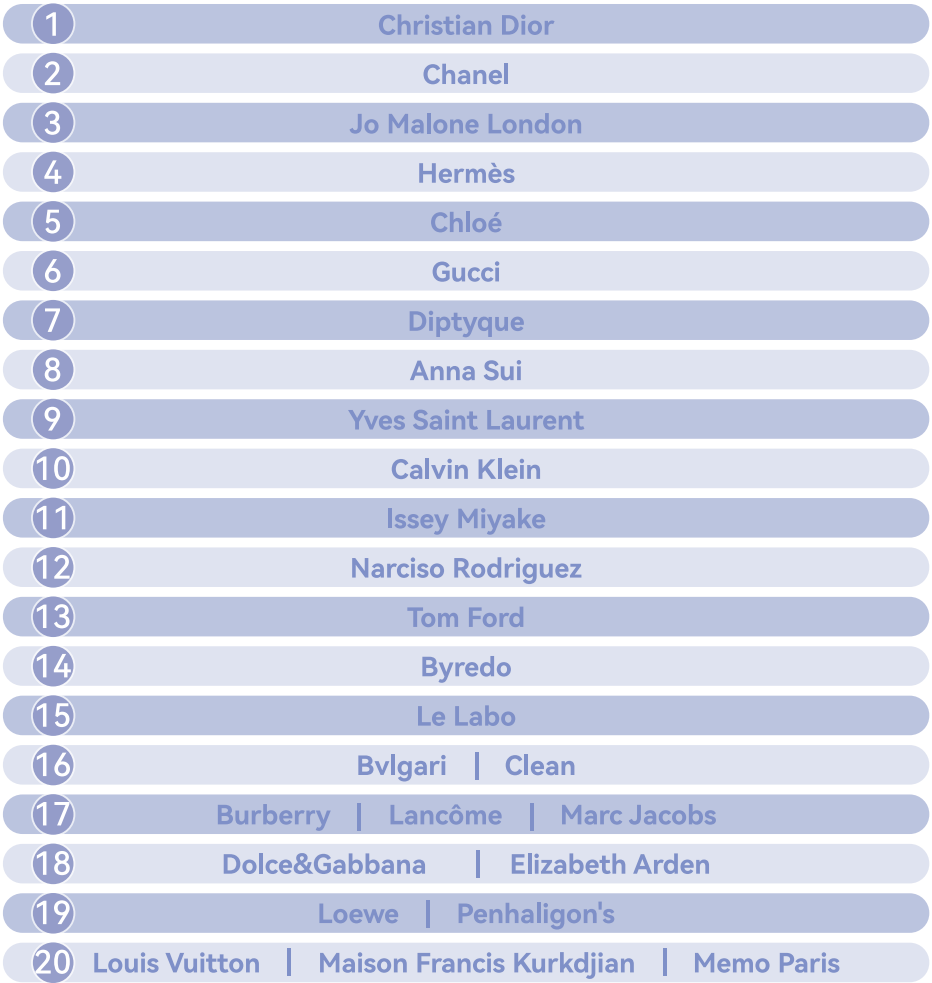
The perfume brands used by respondents show significant diversity, with Christian Dior ranking first, followed by Chanel and Jo Malone London. This highlights the standing and recognition of these brands in the minds of consumers. Furthermore, among the top five brands, luxury brands occupy four positions, indicating a sustained preference for high-end fragrances among consumers (see Table 15).

Among the top 20 perfume brands, 6 are niche brands, including Diptyque, Byredo, Le Labo, Clean, Penhaligon's, and Memo Paris. The emergence of these niche brands reflects contemporary consumers' pursuit of uniqueness and personalization, emphasizing their focus on brand stories, ingredients, and scents (see Table 15).

Respondents showed a high willingness to try niche brands; 95.05% of 1063 respondents indicated they would be willing to try niche brand perfumes and home fragrance products, while only 4.95% said they would not. This result demonstrates broad consumer acceptance of niche brands, reflecting the ongoing demand for uniqueness and personalized fragrances in the market and highlighting potential development opportunities for niche brands in the perfume market (see Table 16).

表十五
Table 154

香水品牌選擇趨勢（列出首20個品牌排名）
Trends in Perfume Brand Selection (Top 20 Perfume Brands)



表十六
Table 15

選擇小眾品牌
Willingness to Try Niche Brands



3.8

家居香氛的使用習慣、產品偏好及對使用者感受的影響 Home Fragrance Usage: Habits, Preferences and the Influence on User Experience

72.05%的受訪者表示有使用家居香氛的習慣，這顯示出香氛產品在家居環境中的廣泛應用（見表十七）。受訪者對不同香氛產品的偏好呈現多樣化，室內騰籐支擴香為最受歡迎的類型，佔24.53%；其後是香薰蠟燭，佔21.58%。香薰精油（18.56%）和家居香氛噴霧（17.63%）同樣受到受訪者的青睞，而擴香石則佔17.19%（見表十八）。

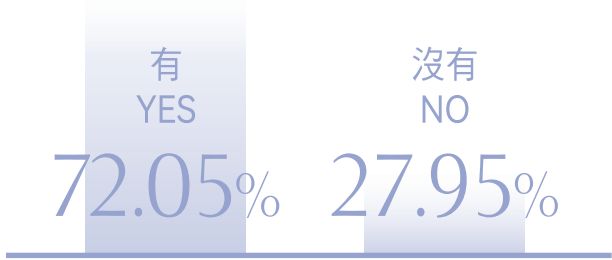
29.32%的受訪者表示使用家居香氛能夠舒緩身心壓力，顯示出香氛產品對於心理健康的正面影響。其他感受包括營造空間氛圍（18.5%）和提升生活儀式感（18.24%），反映出香氛在家居環境中的多重功能（見表十九）。

72.05% of respondents indicated that they use home fragrance products, demonstrating the widespread application of fragrance products in home environments (see Table 17). Respondents' preferences for different fragrance products show diversity, with reed diffusers being the most popular type at 24.53%, followed by scented candles at 21.58%. Aromatherapy oils (18.56%) and home fragrance sprays (17.63%) were also favored, while fragrance stones accounted for 17.19% (see Table 18).

29.32% of respondents indicated that using fragrance can relieve physical and mental stress, highlighting the positive impact of fragrance products on mental health. Other benefits mentioned include creating a space atmosphere (18.5%) and enhancing the sense of life rituals (18.24%), reflecting the multiple functions of fragrance in the home environment (see Table 19).

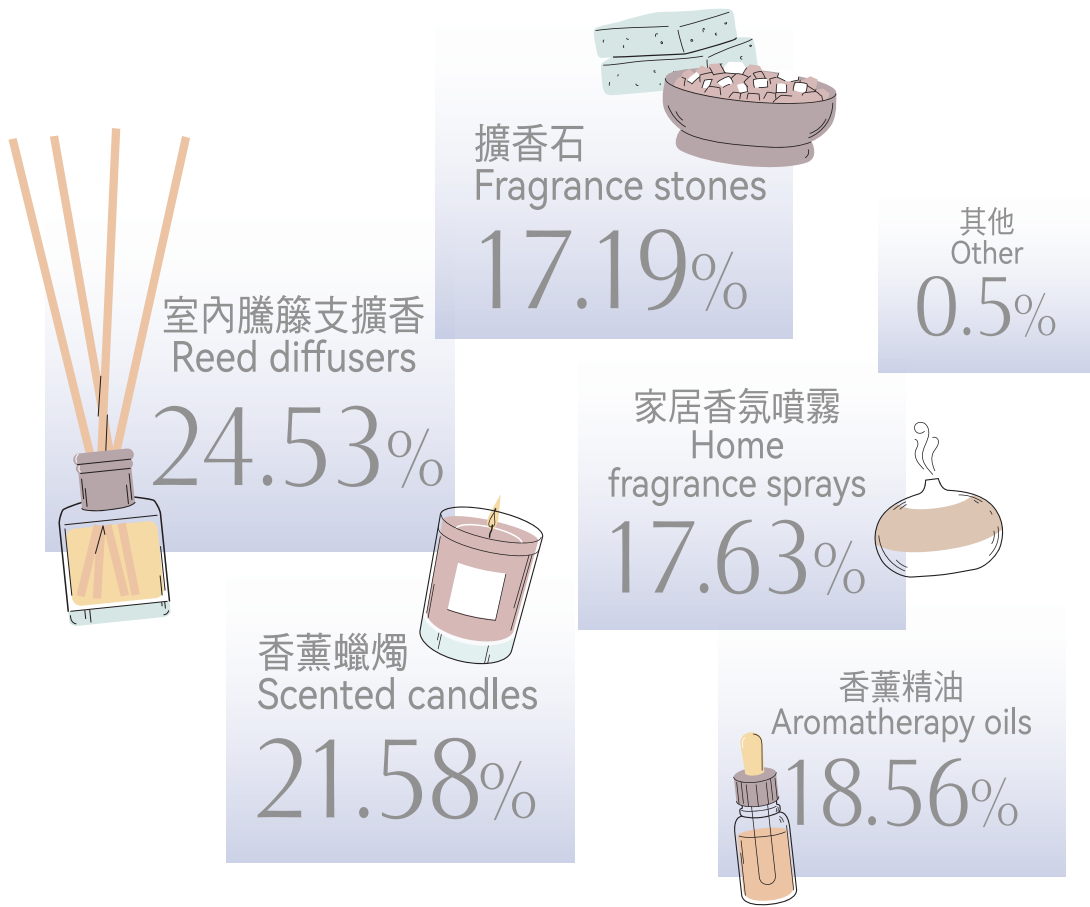
表十七
Table 17

家居香氛使用習慣
Home Fragrance Usage Habits



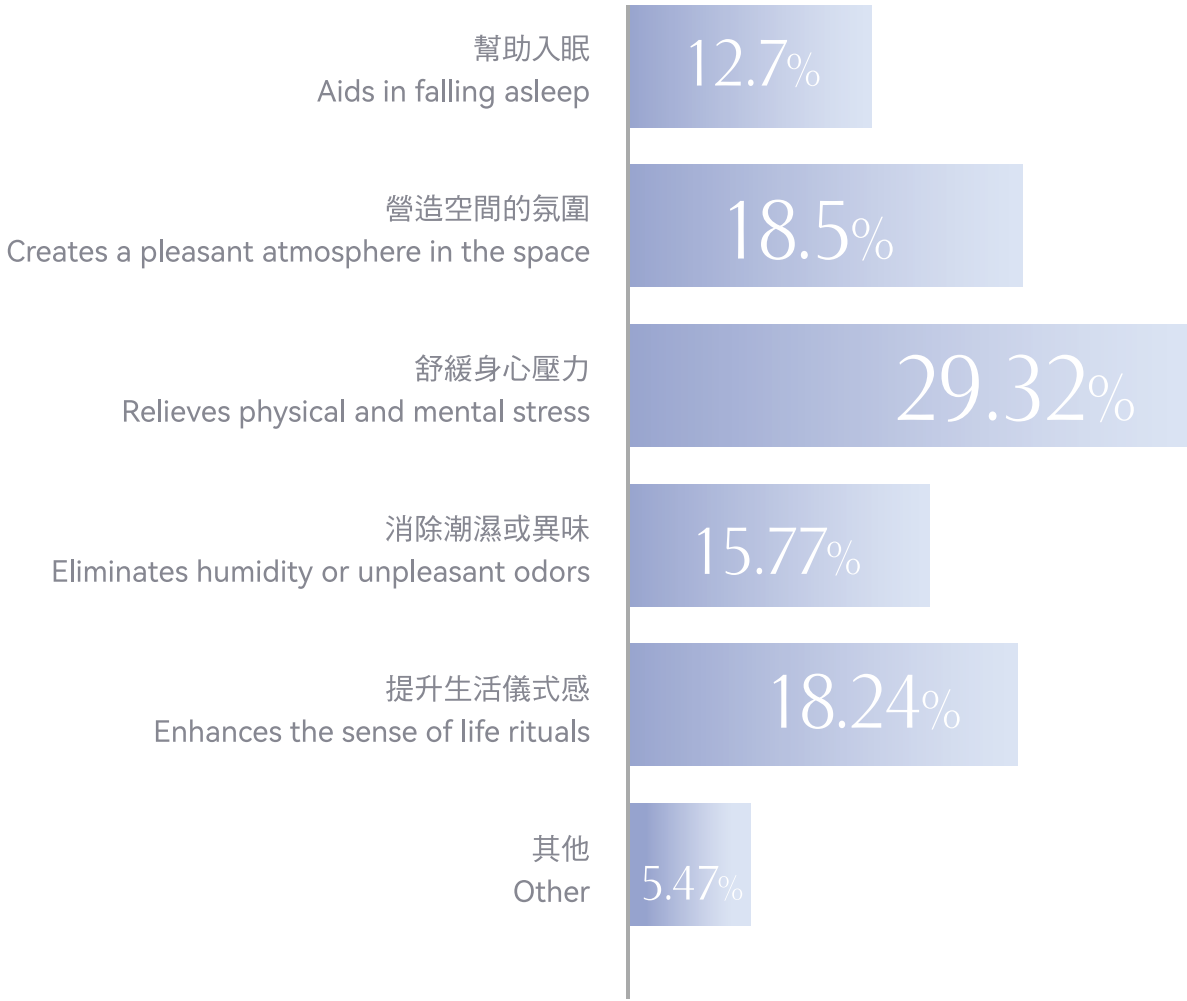
表十八
Table 18

家居香氛類型
Types of Home Fragrance Products



表十九
Table 19

家居香氛使用後的感受
Feelings After Using Home Fragrance Products



4.

市場機遇與挑戰

OPPORTUNITIES AND CHALLENGES

FACING THE FRAGRANCE MARKET

香港及澳門香氣市場的營銷機會

Marketing Opportunities

1 消費者對環保的關注

Consumer Focus on Environmental Protection

隨著環保意識的提高，消費者越來越關注產品的成分及其對環境的影響。這一趨勢促使市場對天然和有機香氛產品的需求上升。品牌可以通過推出符合可持續發展標準的產品來吸引這部分消費者，例如使用可再生資源、無動物測試及可回收包裝等。這不僅能增強品牌形象，還能滿足消費者對環保的期望，從而提高市場競爭力。

With increasing awareness of environmental issues, consumers are paying more attention to product ingredients and their impact on the environment. This trend is driving demand for natural and organic fragrance products. Brands can attract this segment by offering products that meet sustainability standards, such as using renewable resources, being cruelty-free, and featuring recyclable packaging. This not only enhances brand image but also meets consumer expectations for eco-friendliness, thereby increasing market competitiveness.



2 多樣化的產品系列

Diverse Product Range

消費者對香水和家居香氛產品需求的多樣化，促使品牌開發更全面的產品線以滿足不同的需求。市場對不同風格和香氛組合的需求日益增加，包括香水、香氛蠟燭、擴香產品、香氛精油等。品牌通過推出限量版、季節性產品或與知名藝術家合作的系列來吸引消費者，從而拓展市場佔有率並增強顧客忠誠度。

As consumer demand for perfumes and home fragrance products diversifies, brands need to develop a more comprehensive product line to meet various needs. There is growing demand for different styles and fragrance combinations, including perfumes, scented candles, diffuser products, and essential oils. Brands can attract consumers by launching limited editions, seasonal products, or exclusive collections in collaboration with renowned artists, thereby expanding market share and enhancing customer loyalty.

3 數碼化和線上銷售

Digitalization and Online Sales

數碼化轉型和線上銷售的興起為品牌提供了直接接觸消費者的機會。通過網上營銷工具，品牌能夠精準定位目標客戶，並根據消費者的購買習慣和偏好進行個性化推薦。利用社交媒體、電子郵件營銷以及搜索引擎優化等方法，提升顧客的購物體驗。此外，品牌還可以通過線上平台收集消費者反饋，進一步優化產品和服務。

The rise of digital transformation and online sales provides brands with direct access to consumers. Through online marketing tools, brands can precisely target potential customers and offer personalized recommendations based on purchasing habits and preferences. Utilizing social media, email marketing, and search engine optimization can enhance the shopping experience. Additionally, brands can collect consumer feedback through online platforms to further optimize products and services.

4 個性化產品需求增高 Growing Demand for Personalized Products

消費者對個性化和定制化產品體驗的重視，品牌可以開發個性化香水和家居香氛的選項，滿足消費者的獨特需求。例如根據顧客的喜好定制香氣、提供個性化包裝等。這類產品不僅能提升顧客滿意度，還能增強品牌的差異化競爭優勢。

As consumers place greater importance on personalized and customized experiences, brands can develop options for personalized perfumes and home fragrance products to meet unique consumer needs. For instance, customizing scents based on customer preferences or offering personalized packaging. Such products not only enhance customer satisfaction but also strengthen the brand's competitive differentiation.



6 科技創新 Technological Innovation

新技術的應用，如虛擬現實（VR）和擴增實境（AR），為消費者提供了全新的購物體驗。品牌可以利用這些技術提升產品展示和顧客互動，例如通過虛擬試香或增強現實應用程序讓消費者在購買前體驗香水和家居香氛的氣味和效果。這不僅能提升顧客的購物體驗，還能增強品牌的創新形象。

The application of new technologies, such as Virtual Reality (VR) and Augmented Reality (AR), offers consumers a new shopping experience. Brands can utilize these technologies to enhance product displays and customer interactions, such as virtual scent trials or AR applications that allow consumers to experience the scent before making a purchase. This not only enhances the shopping experience but also reinforces the brand's innovative image.



5 社交媒體影響力 Influence of Social Media

社交媒體的快速發展使品牌能夠以創意的方式與消費者互動。品牌可以利用影響者營銷，通過合作推廣產品來提高市場曝光率。此外，社交媒體平台也提供了良好的反饋渠道，使品牌能夠及時了解消費者的需求和偏好，並作出相應調整，從而增強消費者參與度。

The rapid development of social media allows brands to interact with consumers creatively. Brands can leverage influencer marketing to promote products and increase market visibility. Moreover, social media platforms provide excellent feedback channels, enabling brands to quickly understand consumer needs and preferences and make necessary adjustments, thereby enhancing consumer engagement.



7 健康與福祉趨勢 Health and Wellness Trends

隨著人們對健康和福祉的重視，香氛產品與心理健康和放鬆的關聯性愈發受到關注。品牌可以開發具有舒緩效果的香氛產品，如香薰精油和家居擴香等產品，以滿足消費者對健康生活方式的需求。不僅能提高消費者的生活品質，還能增強品牌的市場競爭力。

As people increasingly focus on health and wellness, the association of fragrance products with mental health and relaxation is gaining attention. Brands can develop soothing fragrance products, such as essential oils and home diffusers, to meet consumer demands for a healthy lifestyle. This can improve consumers' quality of life and enhance the brand's market competitiveness.



香港及澳門香氣市場面對的挑戰 Challenges

1 市場競爭激烈 Intense Market Competition

香水及家居香氛市場上品牌和產品眾多，競爭十分激烈。品牌必須不斷創新，以提升形象並吸引消費者的注意力。這需要投入大量的資源，包括產品開發、品牌推廣及行銷策略調整等。

The perfume and home fragrance market is crowded with numerous brands and products, resulting in fierce competition. Brands must continuously innovate to enhance their image and capture consumer attention. This requires significant investment in resources, including product development, brand promotion, and adjustments to marketing strategies.

2 消費者偏好的變化 Changing Consumer Preferences

隨著時間推移，消費者的偏好和需求會發生變化。品牌需要持續調整產品線和市場策略，具備靈活性和敏銳的市場洞察力。例如定期進行市場調查研究、收集消費者反饋及分析趨勢將是維持競爭力的關鍵，才能及時應對消費者的需求變化。

Over time, consumer preferences and demands evolve. Brands need to consistently adjust their product lines and market strategies, demonstrating flexibility and keen market insight. Regular market research, gathering consumer feedback, and trend analysis will be key to maintaining competitiveness and responding promptly to changes in consumer needs.

3 品牌忠誠度下降 Declining Brand Loyalty

在選擇眾多的市場環境中，消費者對品牌的忠誠度日益降低。這要求品牌不僅要提供高品質的產品，還需要持續創新和改善顧客服務，以保持消費者的關注。品牌可以通過建立會員制度、提供個性化服務和促銷活動來增強顧客的忠誠度，並提升顧客的品牌體驗。

In a market with many choices, consumer loyalty to brands is diminishing. This necessitates that brands not only provide high-quality products but also continuously innovate and improve customer service to retain consumer interest. Brands can enhance customer loyalty by establishing membership programs, offering personalized services, and implementing promotional activities to improve the overall brand experience.

4 市場飽和 Market Saturation

隨著新品牌和產品的快速增長，市場可能出現飽和現象。品牌需要尋找新的市場細分或開發創新產品以維持增長，包括針對特定人群（如男性香水、運動香水等）或開發新穎的香氛概念來吸引新的消費者群體。

With the rapid growth of new brands and products, market saturation may occur. Brands need to seek new market segments or develop innovative products to sustain growth. This could include targeting specific demographics (such as men's fragrances or sports fragrances) or creating novel fragrance concepts to attract new consumer groups.



5 宣傳教育 Promotional Education

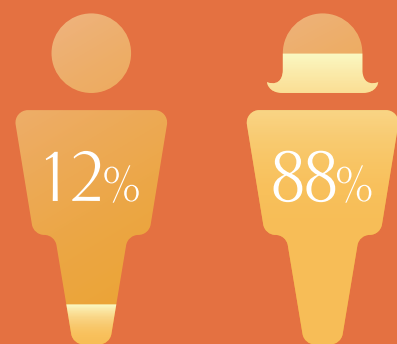
隨著消費者對香水成分和創作故事的關注增加，品牌需要投入更多資源來宣傳及教育消費者，以提升其對產品的了解和信任。通過舉辦香水品鑑會、提供詳細的產品資訊和成分說明、以及利用社交媒體及互聯網進行推廣等方式來實現，提高消費者對品牌及其產品的認知將有助於增強市場競爭力。

As consumers become more interested in fragrance ingredients and creation stories, brands need to invest more resources in promoting and educating consumers to enhance their understanding and trust in the products. This can be achieved through by hosting fragrance tasting events, providing detailed product information and ingredient explanations, and utilizing social media and internet for promotions. Improving consumer recognition of the brand and its products will help strengthen market competitiveness.

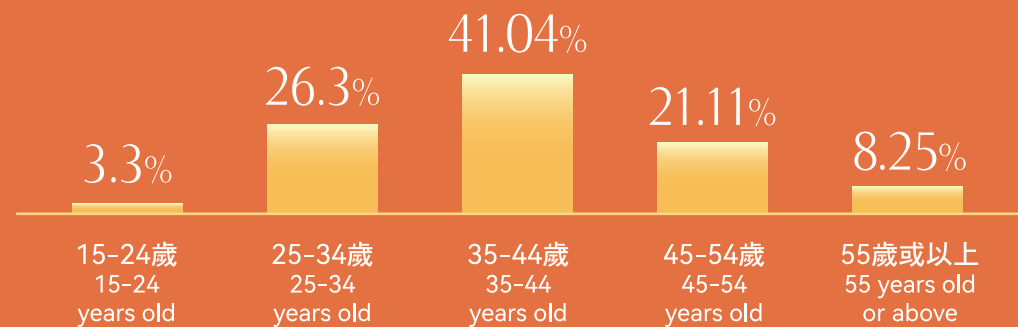
5. 受訪者基本資料

PROFILE INSIGHTS: BACKGROUNDS OF INTERVIEW PARTICIPANTS

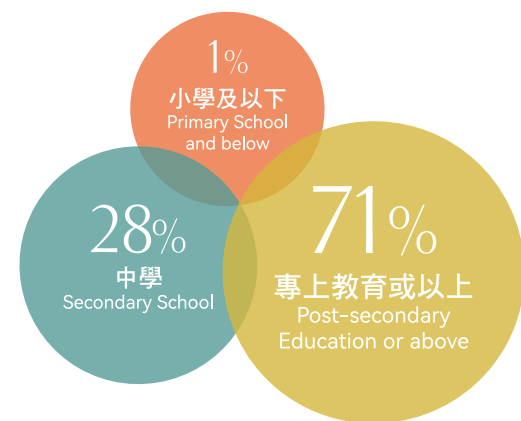
性別 Gender



年齡 Age



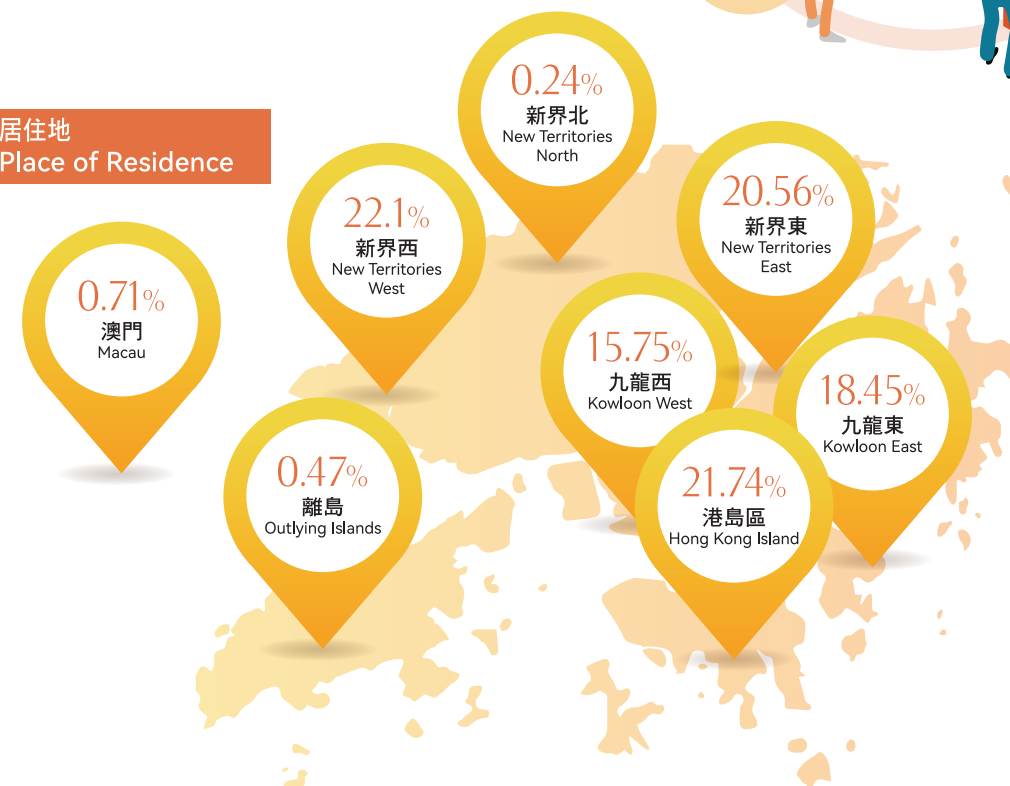
教育程度 Education Level



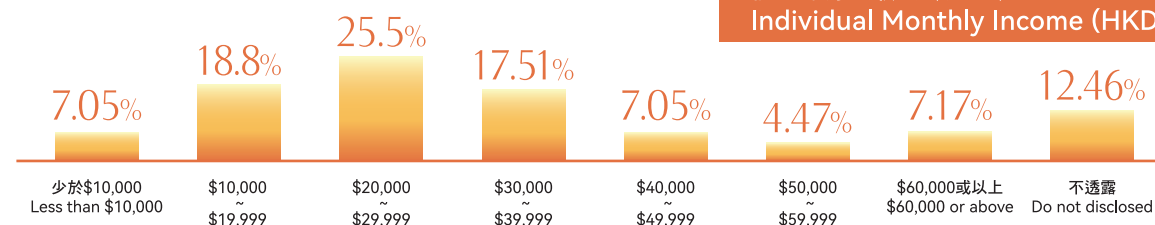
就業情況 Employment Status



居住地 Place of Residence



個人每月總收入（港元） Individual Monthly Income (HKD)



6. 總結 CONCLUSION

在香港和澳門地區，消費者對香水及家居香氛產品的需求持續增長，這一趨勢主要受到市場競爭及產品多樣化的推動。調查顯示，消費者的選擇行為受到不同場合、季節和心情等多重因素影響，而花香調的香水尤其受到青睞。此外，社交媒體和互聯網已成為主要的產品信息來源，而小眾品牌的興起則反映出市場對獨特性和個性化產品的強烈需求。

根據Frost & Sullivan的資料，香水及家居香氛市場在未來 5 年內將穩定增長，全球香水零售額市場規模由2023年的人民幣7,096億元，預計2028年將增長至人民幣8,411 億元，複合年增長率為3.5%。

在激烈的市場競爭中，品牌必須持續創新，並適應消費者需求的變化，尤其是在可持續性發展和數碼化轉型方面。本報告提供的市場洞察將為相關企業制定更具針對性的產品和營銷策略提供參考，幫助它們抓住市場機遇，提升品牌競爭力。展望未來，香港及澳門的香水及香氛市場將持續發展，品牌應充分利用這一趨勢，以滿足消費者日益增長的需求。

In the Hong Kong and Macau, consumer demand for perfumes and home fragrance products continues to grow, driven primarily by intense market competition and product diversity. Surveys indicate that consumer choice behavior is influenced by multiple factors, including occasion, season, and mood, with floral fragrances being particularly favored. Additionally, social media and the internet have become major sources of product information, while the rise of niche brands reflects a strong market demand for uniqueness and personalized products.

According to Frost & Sullivan, the global market size in terms of retail sales of perfumes increased from RMB 709.6 billion in 2023 and is expected to grow to RMB 841.1 billion in 2028, with a CAGR of 3.5%.

In this competitive market landscape, brands must continuously innovate and adapt to changing consumer demands, particularly regarding sustainability and digital transformation. The market insights provided in this report will serve as a reference for companies to develop more targeted product and marketing strategies, helping them seize market opportunities and enhance their competitiveness. Looking ahead, the fragrance market in Hong Kong and Macau will continue to evolve, and brands should leverage this trend to meet the growing demands of consumers.

7. 鳴謝 ACKNOWLEDGEMENTS

2024港澳香水及香氛產品市場發展趨勢白皮書由Eternal Group旗下的國際香氛協會推出。
特此感謝（以下按姓氏字母順序列出，排名不分先後）：

The 2024 Hong Kong and Macau Perfume and Home Fragrance White Paper is launched by the International Fragrance Foundation under Eternal Group.
We would like to express our gratitude (listed below in alphabetical order by surname):

Cosmart

ELLE Hong Kong

Eternal Group
穎通集團

8.

參考資料 REFERENCES

**Hong Kong Economy, The Government of the Hong Kong Special Administrative Region
Half-Yearly Economic Report**

澳門特別行政區政府經濟及科技發展局
澳門經濟概況 2024 年上半年

**PwC Hong Kong
Hong Kong Retail Outlook for 2024**

**Frost & Sullivan
Research on the perfume industry, skincare industry, color cosmetics industry, personal care
industry, eyewear industry, and home fragrances industry from 2018 to 2028**