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2025 HONG KONG AND MACAU

FRAGRANCE MARKET TRENDS White Paper

2025港澳香氛市場發展趨勢白皮書

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2025 HONG KONG AND MACAU

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香氛產品在生活中的角色由輔助性質逐漸轉變為空間應用的關鍵元素

Fragrance products shifting from a supporting role in daily life to becoming a pivotal element in spatial applications

全球嗅覺經濟持續發展，香氛產品在生活中的角色正由輔助性質逐漸轉變為空間應用的關鍵元素，並於不同場景中展現出愈加顯著的影響力。嗅覺作為五感中最能喚起記憶與情感的感官，隨著消費者對體驗式消費的重視提升，香氛產品已廣泛應用於家居、商業及零售等空間。市場對產品創新及多元應用的需求持續增長，進一步推動產業向高品質與多樣化方向發展。

為全面掌握香港及澳門地區消費者在香氛產品的使用及消費趨勢，並深入剖析香氛於商業空間的應用及未來發展方向，本白皮書重點關注科技進步與可持續發展對產業所帶來的影響。2025年7月，國際香氛協會聯同新傳媒集團，針對香港及澳門地區790名受訪者開展系統性市場調查，全面收集並分析其香氛產品的使用習慣及消費行為數據。

本報告旨在通過科學調研數據與專業洞察，全方位呈現香氛市場的最新動態，深入探討消費者行為及產業發展趨勢，為業界提供決策參考與未來發展方向。

The global olfactory economy continues to develop rapidly, with fragrance products shifting from a supporting role in daily life to becoming a pivotal element in spatial applications. Their influence is increasingly apparent across a broad spectrum of environments. As the sense most strongly linked to memory and emotion among the five senses, olfaction is gaining growing importance as consumers prioritize experiential consumption. Consequently, fragrance products are now widely integrated not only in homes, but also in commercial and retail settings. Rising market demand for product innovation and diversified applications is further propelling the industry toward higher quality and greater variety.

To gain a comprehensive understanding of consumer usage and purchasing trends relating to fragrance products in Hong Kong and Macau, and to conduct an in-depth analysis of the applications and future potential of fragrance in commercial spaces, this white paper places particular emphasis on the influence of technological advancements and sustainability within the industry. In July 2025, the International Fragrance Association, in collaboration with the New Media Group, conducted a systematic market study involving 790 respondents from Hong Kong and Macau, collecting and thoroughly analyzing data on their fragrance usage habits and consumer behaviors.

This report aims to deliver a holistic, data-driven perspective on the latest developments in the fragrance market, offering in-depth insights into consumer behavior patterns and industry evolution. It is intended to serve as a valuable reference for industry professionals in strategic decision-making and in mapping future development directions.

市場概況
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「悅己經濟」潮流及居家生活升級需求下，全球家居香氛市場規模將保持強勁增長動力

Continued rise of the self-care economy and growing demand for enhanced home environments, global home fragrance market is expected to maintain robust growth

全球家居香氛市場規模

根據 Fortune Business Insights 於2024年11月發佈的《Home Fragrance Market Size, Share & Industry Analysis》報告，2024年全球家居香氛市場規模已達248.9億美元。在「悅己經濟」潮流以及居家生活升級需求的持續推動下，市場預計將保持強勁增長動力，至2032年預計將達到400億美元，年複合增長率為6.56%。其中，室內擴香、精油與香氛蠟燭等品類，受健康意識提升、個性化追求及高端生活方式興起等趨勢影響，呈現較為明顯的增長。些產品在年輕及高消費力群體中愈受青睞，反映市場對健康、個性與生活品質持續關注。

亞太區香氛市場增長動能

亞太區近年來已成為全球香氛產業最重要的增長引擎。根據 Statista 於 2024 年發佈之行業數據，2025 年亞太區整體香氛市場規模預計將達到127.5億美元，約佔全球市場20-28%。這一數據涵蓋個人使用香水、身體香氛、家居及商業空間香氛等產品類別。在家居香氛領域，亞太市場展現出顯著的成長動能，充分反映區內消費者對氣味生活品質的重視，對健康情緒管理、家居空間氛圍營造的高度追求，以及市場未來發展的廣闊潛力。

Global Home Fragrance Market Overview

According to the "Home Fragrance Market Size, Share & Industry Analysis" report published by Fortune Business Insights in November 2024, the global home fragrance market was valued at US$24.89 billion in 2024. Driven by the continued rise of the self-care economy and growing demand for enhanced home environments, the market is expected to maintain robust growth, projecting a value of US$40 billion by 2032 with a compound annual growth rate (CAGR) of 6.56%.

Product categories such as diffusers, essential oils, and scented candles are experiencing especially strong growth, driven by the rise of health-consciousness, personalization, and premium lifestyles. These trends directly fuel the popularity of these products among younger and more affluent consumers, reflecting a broader market shift toward wellness, individuality, and elevated living standards.

Asia Pacific Fragrance Market: Key Growth Engine and Emerging Opportunities

In recent years, the Asia Pacific region has emerged as a primary growth engine for the global fragrance industry. A According to Statista's 2024 industry data, the overall fragrance market in Asia Pacific is projected to reach US$12.75 billion in 2025, accounting for approximately 20–28% of the global market. This estimate includes personal perfumes, body fragrances, and home and ambient fragrance products.

Within this landscape, the home fragrance segment is experiencing particularly strong growth. This momentum is driven by an increasing consumer emphasis on olfactory quality of life, with greater attention placed on emotional well-being and the overall enhancement of living spaces. These trends underscore the significant development potential and promising outlook for the Asia Pacific fragrance market.

消費者香氛使用與消費趨勢

Consumer Fragrance Usage & Consumption Trends

第三部份
SECTION

3

香氛產品不僅僅是單純的氣味裝飾，更逐漸成為提升空間體驗、調節情緒與滿足多元家居需求的重要元素

Home Fragrance Products has evolved beyond simple decorative purposes, it becomes essential tools for enhancing spatial experiences, regulating emotions and meeting a variety of household needs

3.1 香氛使用習慣

81.1%的受訪者表示平時有使用家居香氛產品（如蠟燭、室內擴香）的習慣。該比例較本協會於2024年發佈的《港澳地區香水及家居香氛市場發展趨勢白皮書》中的72.05%，上升約9個百分點，反映家居香氛產品的普及程度持續提升。此外，在有家居香氛使用習慣的群體中，86.1%受訪者會將個人偏好的香水香氣延伸至家居香氛產品，顯示個人喜好對產品選擇具有一定的持續性和一致性。

在香氛產品類型選擇方面，受訪者最常使用的為精油及擴香器，佔22.8%；其次為室內擴香（21.8%）和香氛蠟燭（20.5%），香氛噴霧則佔19.4%。整體而言，受訪者相對偏好能夠持續釋放香氣的產品類型。雖然線香和車用香氛的整體使用比例較低，分別為8%及7.5%，但這兩類產品在市場上仍擁有穩定的愛好群體，反映出市場需求的多元化與細分趨勢。

在使用場所方面，香氛產品主要應用於家居空間，如睡房（27.4%）、洗手間（25.7%）及客廳（25%），顯示消費者對居家舒適與氛圍營造的高度重視。同時，車輛內亦有一定的特定使用群體，佔8.3%。

在選擇香氛產品時，受訪者最重視香氛濃度（24.6%），其次為價格定位（20.7%）及無火安全性（17.1%）。在使用情境方面，消費者主要將香氛產品用於改善空間異味及提升居家氛圍，分別佔19.9%和19.1%。其次為緩解壓力與焦慮（17.9%）及提升睡眠品質（13.5%）。數據顯示，香氛產品為多數消費者帶來正向感受，如身心放鬆（30%）、愉悅舒心（26.8%）及寧靜平和（22%）。

由此可見，香氛產品在香港及澳門消費者的日常生活中，已不僅僅是單純的氣味裝飾，更逐漸成為提升空間體驗、調節情緒與滿足多元家居需求的重要元素。產品的安全性、香氛品質與個人化體驗日益受到關注，反映出市場需求的成熟與多樣化發展。

3.1
Patterns of Fragrance Usage

According to the survey, 81.1% of respondents reported regularly using home fragrance products such as candles and diffusers. This represents an increase of nearly 9 percentage points from the 72.05% reported in the Association's 2024 "Hong Kong and Macau Perfume and Home Fragrance White Paper," indicating a steady rise in the prevalence of home fragrance usage. Furthermore, among those who use home fragrance products, 86.1% extend their personal perfume preferences to their choice of home fragrances, reflecting a high degree of consistency and continuity in scent preferences.

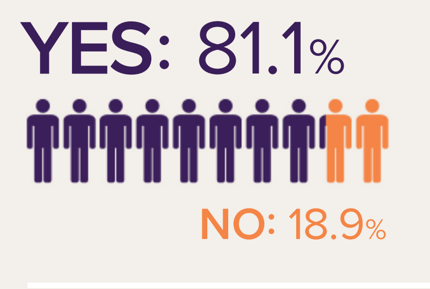
In terms of product preferences, essential oils and diffusers are the most frequently used (22.8%), followed by reed diffusers (21.8%) and scented candles (20.5%), with fragrance sprays at 19.4%. Overall, respondents show a clear inclination toward products that provide sustained fragrance release. Although the usage rates for incense (8%) and car fragrances (7.5%) are lower, both categories maintain a stable following, illustrating the growing diversification and segmentation of the market.

Regarding areas of use, fragrance products are most commonly applied in living spaces such as bedrooms (27.4%), bathrooms (25.7%) and living rooms (25%), underscoring the importance consumers place on home comfort and atmosphere. Additionally, there is a notable user base for fragrance products within vehicles, at 8.3%.

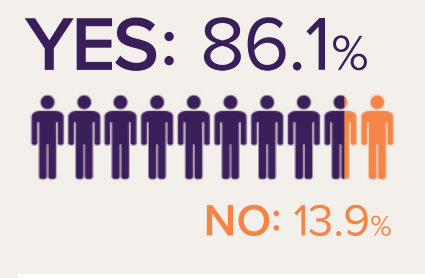
When selecting home fragrance products, respondents prioritize fragrance intensity (24.6%), followed by price positioning (20.7%) and flameless safety (17.1%). In terms of application scenarios, the primary motivations for use are eliminating unpleasant odors (19.9%) and enhancing home ambience (19.1%). Other notable reasons include relieving stress and anxiety (17.9%) and improving sleep quality (13.5%). The data also indicate that most consumers associate home fragrance products with positive effects such as physical and mental relaxation (30%), comfort and happiness (26.8%) and a sense of calm and tranquility (22.%).

Overall, these findings demonstrate that home fragrance products among Hong Kong and Macau consumers have evolved beyond simple decorative purposes. They have become essential tools for enhancing spatial experiences, regulating emotions and meeting a variety of household needs. Increasing attention to product safety, fragrance quality and personalized experiences reflects a mature and increasingly diverse market landscape.

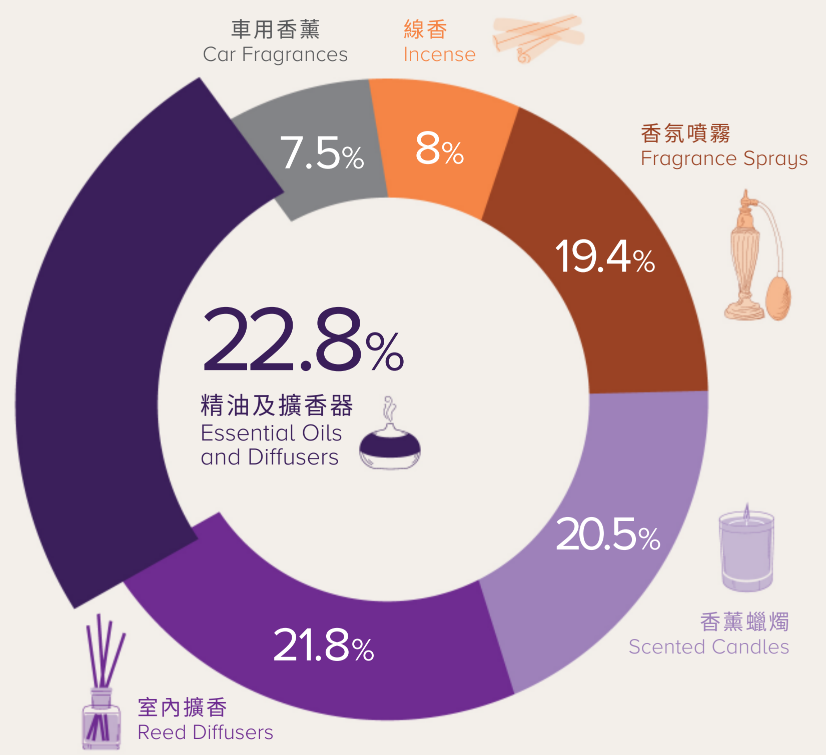
圖表 Chart 1 家居香氛產品使用率
Usage of Home Fragrance Products



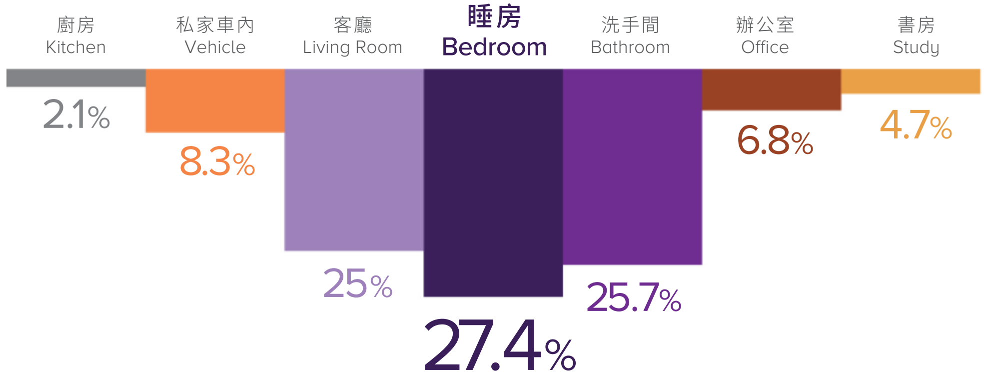
圖表 Chart 2 香水氣味延伸至家居香氛比例
Extension of Preferred Perfume Scents to Home Fragrances



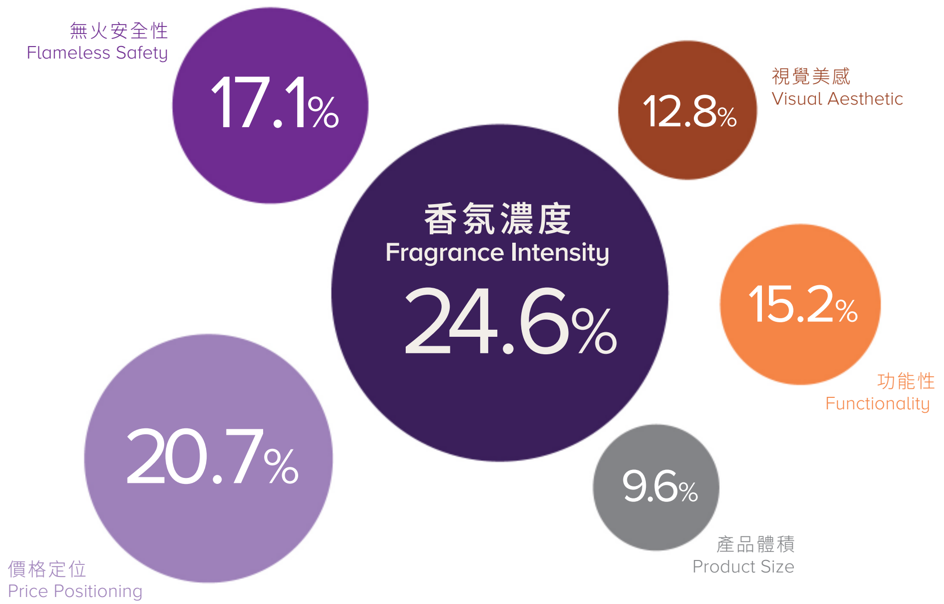
圖表 Chart 3 使用的香氛產品類型
Types of Fragrance Products Used



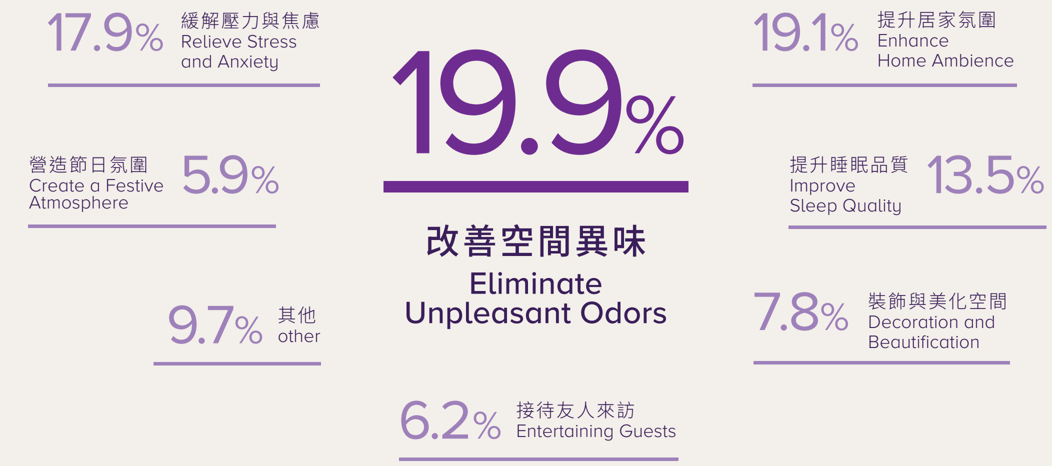
圖表 Chart 4 香氛產品使用場所
Locations of Fragrance Product Use



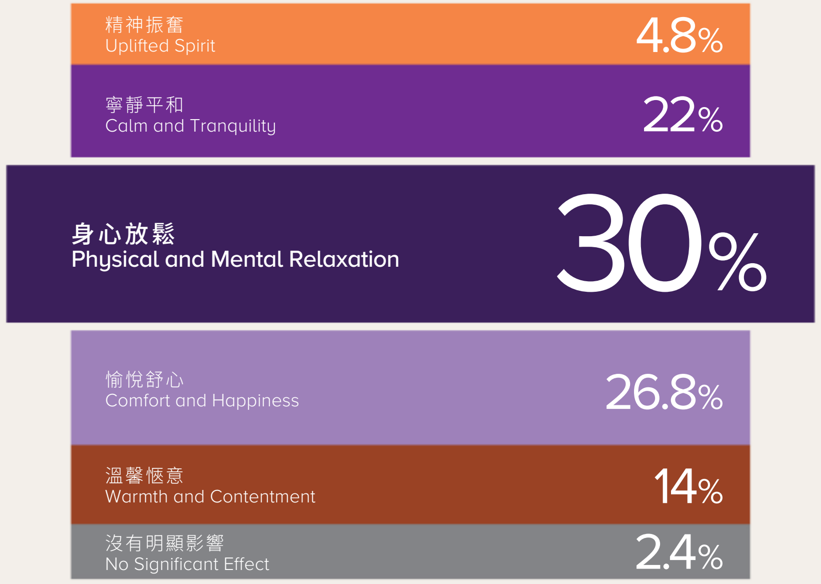
圖表 Chart 5 香氛產品選擇考量因素
Factors Considered When Choosing Fragrance Products



圖表 Chart 6 香氛產品使用情境
Scenarios for Using Fragrance Products



圖表 Chart 7 使用香氛產品時的常見情緒反應
Common Emotional Responses When Using Fragrance Products



3.2 香氛消費動向 Fragrance Consumption Dynamics

在香氛產品的購買行為方面，39.9%的受訪者每年購買4至6件產品，35.3%為1至3件，15.3%則為7至10件，僅有9.5%每年購買11件或以上。整體數據顯示，多數消費者的購買頻率屬於中等水平。至於年度支出結構，35.8%的受訪者每年在香氛產品上的花費介乎HK$501至HK$1,000，花費HK$500或以下及HK$1,001至$3,000的比例則分別為27.2%，而年支出超過HK$3,000的則佔9.8%。

在香氛產品的資訊來源與購買意欲方面，43.3%的受訪者偏好於實體店親身體驗，朋友及家人介紹佔24.4%，網上評論則佔15.8%。相較之下，KOL分享及媒體廣告分別為6.9%及9.6%。此結果反映，實體嗅覺體驗依然是主導消費決策的核心因素。

在購買動機方面，香氣是受訪者最常考慮的因素，佔26.6%；其後為購物優惠（15.3%）、香氛成分（14.9%）、產品功能性（14.7%），而產品設計與包裝則佔12.7%。這些數據顯示，消費者在選購香氛產品時，主要關注感官體驗與產品的實用性，同時也會考慮價格優惠及產品成分等其他因素。

整體來看，香港及澳門香氛市場的消費者普遍重視親身體驗及產品本質。若能持續完善產品的香氛品質，並提升實體店體驗，同時結合口碑推廣與線上資訊透明化，有助於提升消費者忠誠度，並穩固核心客群。

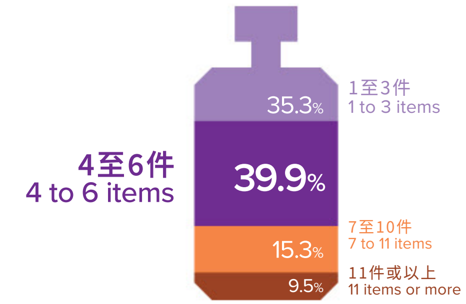
Regarding purchase behavior for fragrance products, 39.9% of respondents purchase 4 to 6 items per year, 35.3% purchase 1 to 3 items and 15.3% purchase 7 to 10 items, while only 9.5% buy 11 or more items annually. The data indicate that most consumers exhibit a moderate purchasing frequency. In terms of annual spending, 35.8% of respondents spend between HK$501 and HK$1,000 on fragrance products each year, 27.2% spend HK$500 or less and another 27.2% spend between HK$1,001 and HK$3,000; 9.8% report annual expenditures exceeding HK$3,000.

When it comes to sources of information and purchase intent, 43.3% of respondents prefer in-store experiences, 24.4% rely on recommendations from friends and family and 15.8% consult online reviews. In comparison, key opinion leader endorsements and media advertising account for 6.9% and 9.6% of responses, respectively. These results indicate that in-person olfactory experiences remain the primary factor influencing consumer decision-making.

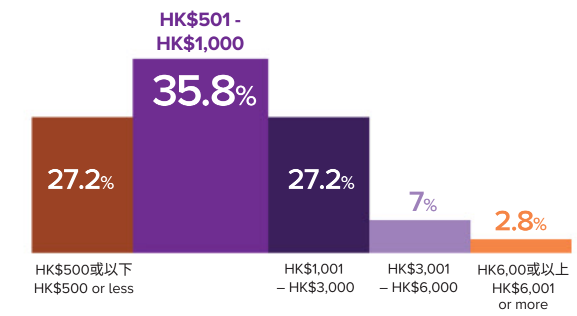
In terms of purchase motivation, scent is the most frequently considered factor, cited by 26.6% of respondents, followed by promotional offers (15.3%), fragrance ingredients (14.9%) and product functionality (14.7%). Product design and packaging account for 12.7% of responses. These figures indicate that consumers place primary emphasis on sensory experience and product utility when selecting fragrance products, while also taking pricing and ingredients into consideration.

Overall, consumers in the Hong Kong and Macau fragrance markets place strong value on in-person experiences and product quality. Enhancing fragrance quality, elevating experiences at physical stores, and integrating word-of-mouth marketing with increased transparency of online information will further strengthen consumer loyalty and solidify the core customer base.

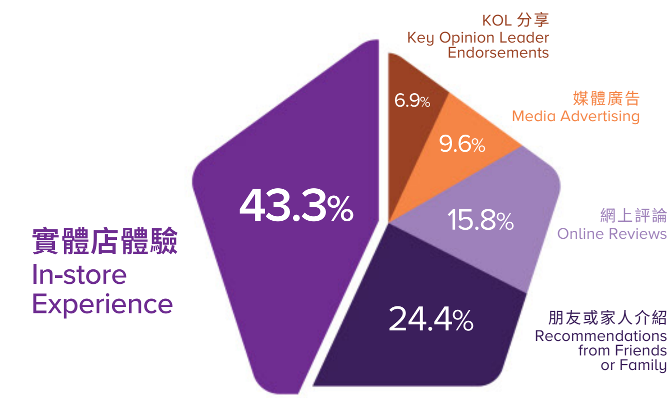
圖表 Chart 8 每年平均購買的香氛產品數量 Average Number of Fragrance Products Purchased Annually



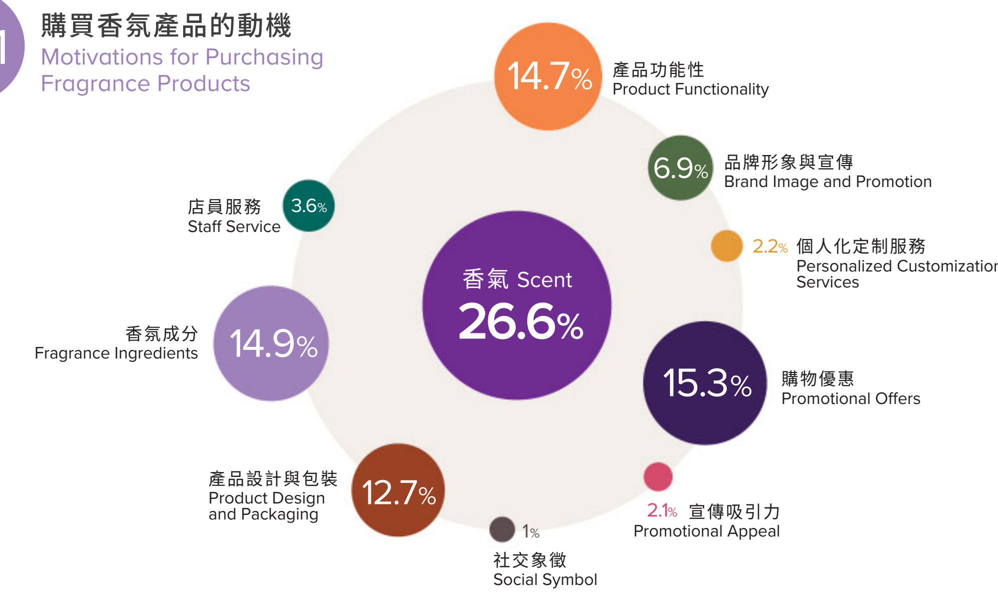
圖表 Chart 9 每年香氛產品的平均支出 Average Annual Expenditure on Fragrance Products



圖表 Chart 10 認識及產生購買香氛產品意欲的途徑 Learning About and Developing Purchase Intent for Fragrance Products



圖表 Chart 11 購買香氛產品的動機 Motivations for Purchasing Fragrance Products



商業空間的香氛應用

Fragrance Applications in Commercial Spaces

第四部份
SECTION

4

香氛應用正成為打造商業空間差異化與提升顧客忠誠度的有效策略

The use of fragrance is emerging as an effective strategy for differentiating commercial spaces and enhancing customer loyalty

在商業空間中，香氛的應用已成為提升消費體驗與空間價值的重要元素。調查顯示，K11 MUSEA、國際金融中心商場（ifc mall）以及海港城（Harbour City）是受訪者最常提及設有香氛設置的香港大型商場，其中高達43.4%的受訪者提及K11 MUSEA，顯示其香氛設計策略在品牌形象塑造與吸顧客吸引方面具有顯著成效。而在酒店領域，香格里拉酒店（Shangri-La Hotels and Resorts）、澳門銀河（Galaxy Macau）及香港四季酒店（Four Seasons Hotel Hong Kong）亦廣獲受訪者認同，反映香氛設計在高端商業空間中的普及與重視程度。

分析受訪者對香氛設施的觀感，有32.2%認為香氛能「提升舒適感」，25.6%指出其有助「營造奢華格調氛圍」，24.6%認同香氛有助「增強品牌形象」，另有12.6%覺得香氛設置展現「時尚新穎」。可見，香氛設計於商業空間的價值已獲大多數消費者認同，成為品牌塑造與體驗升級的重要一環。

關於受歡迎的香氛類型，26%的受訪者偏好花香調，其次為木質香調（21.3%）、柑橘調（17.9%）、海洋香調（16%）、草本香調（15.6%）。此反映以自然、舒適為主的香氛更能獲得大眾青睞。

進一步來看，70.1%的受訪者更傾向於設有香氛設置的同類型場所，僅5.3%偏好無香氛，24.6%則認為氣味對觀感無顯著影響。此外，58%的受訪者表示，氣味會讓他們願意延長在相關場所的停留時間，而52.3%認為香氛設計會提升其消費意欲。雖然正面影響的人數略多於一半，但另有相當比例的受訪者表示未受到影響，顯示香氛在消費者行為上的影響具有一定潛力，同時也展現出個人偏好之間的多樣性。

至於香氛強度的偏好，67%的受訪者選擇「適中」，19.9%傾向「極清淡」，僅有9.8%偏好「明顯」，3.3%則認為香氛應只設於重點位置如正門。可見，消費者普遍追求低調、自然且不具壓迫感的香氛氛圍。

綜合數據觀察，香氛應用正成為打造商業空間差異化與提升顧客忠誠度的有效策略。在現今講究品牌細節與顧客體驗的市場環境下，品牌方應根據目標客群的感官偏好，量身定制香氛設計，兼顧恰到好處的氛圍營造與多元化表現，讓香氛成為推動空間價值提升與品牌形象強化的重要驅動力。

In commercial environments, the use of fragrance has increasingly become a key element for enhancing both customer experience and spatial value. Survey results show that K11 MUSEA, International Finance Centre Mall and Harbour City are the most frequently mentioned Hong Kong shopping malls with notable scent installations. Among these, as many as 43.4% of respondents cited K11 MUSEA, demonstrating the significant impact of its scent strategy in shaping brand image and attracting customers. In the hotel sector, Shangri-La Hotels and Resorts, Galaxy Macau and Four Seasons Hotel Hong Kong are widely recognized by respondents, reflecting the prevalence and importance of fragrance design in high-end commercial settings.

In terms of perceptions of fragrance installations, 32.2% of respondents believe that fragrance "enhances comfort", 25.6% indicate it helps "create a luxurious atmosphere", 24.6% agree it "strengthens brand image" and 12.6% feel it demonstrates "modernity and innovation". The findings clearly show that most consumers recognize the value of fragrance design in commercial spaces, making it an essential part of brand building and experience enhancement.

Regarding fragrance preferences, 26% of respondents favor floral fragrances, followed by woody (21.2%), citrus (17.9%), marine (16%) and herbal (15.6%) options. These findings indicate that fragrance profiles emphasizing naturalness and comfort are particularly well received by the public.

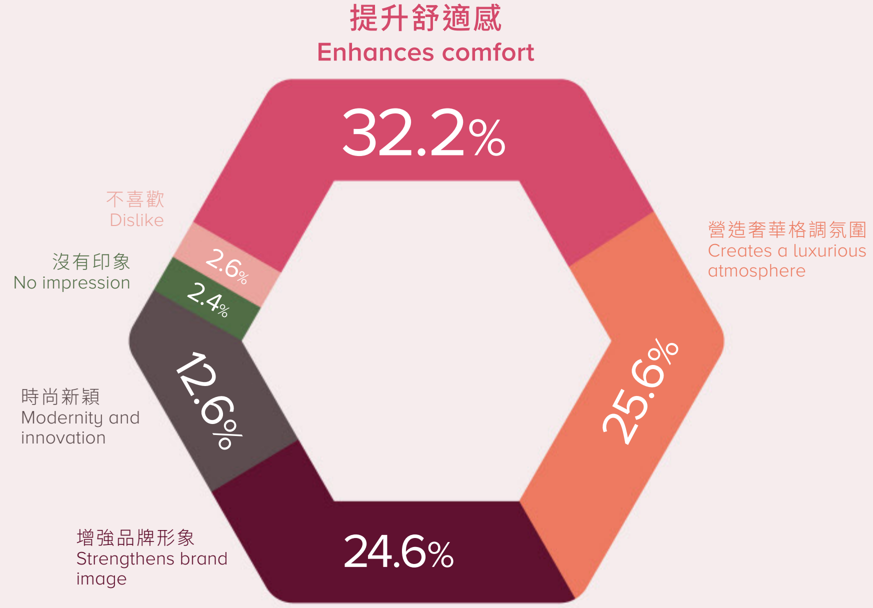
Additionally, 70.1% of respondents prefer venues with scent installations, while only 5.3% prefer spaces without fragrance, and 24.6% feel that scent has no significant impact on their perception. Moreover, 58% report that scent would encourage them to spend more time in a space, and 52.3% believe that fragrance design increases their desire to make purchases. Although slightly more than half report positive effects, a considerable portion remain unaffected, indicating both the potential of scent to influence consumer behavior and the diversity of individual preferences.

When it comes to fragrance intensity, 67% of respondents prefer a "moderate" level, 19.9% opt for "very subtle," 9.8% prefer a "noticeable" scent, and 3.3% believe fragrance should be limited to key areas such as entrances. These findings indicate that consumers generally favor a subtle, natural, and unobtrusive fragrance ambiance.

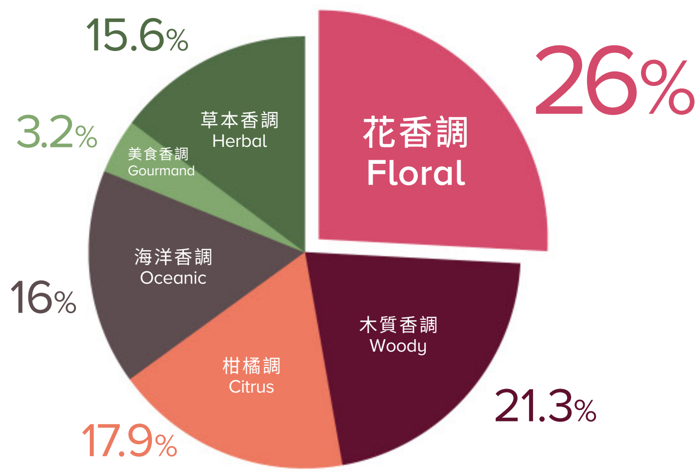
Taken together, the data indicate that the use of fragrance is emerging as an effective strategy for differentiating commercial spaces and enhancing customer loyalty. In today's market, where attention to brand detail and customer experience is paramount, brands should tailor fragrance design to the sensory preferences of their target audience, striking the right balance between ambiance and diversity. In this way, scent can become a vital driver in elevating spatial value and strengthening brand identity.

圖表 Chart 12 香港及澳門地區設有香氛設置的首三間商場及酒店
Top 3 Shopping Malls and Hotels with Scent Installations in Hong Kong and Macau

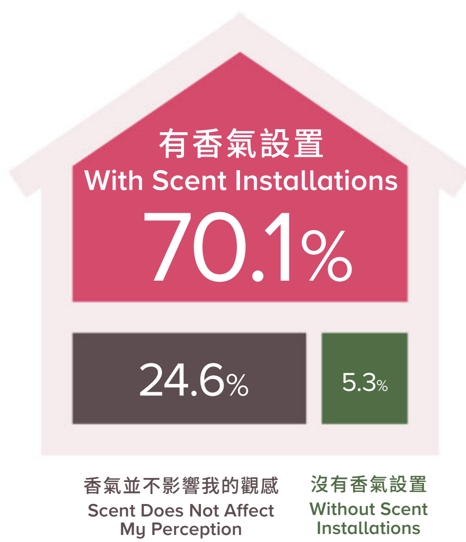
圖表 Chart 13 香氛設置於商業空間帶來的印象
Impressions of Fragrance Installations at Commercial Spaces



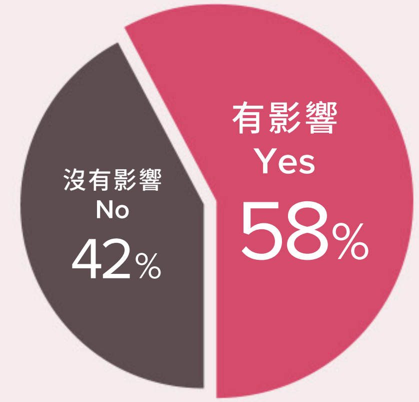
圖表 Chart 14 最受歡迎的空間香氛氣味類型
Most Favored Ambient Fragrance Types



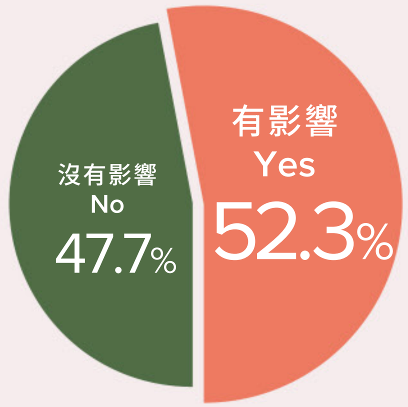
圖表 Chart 15 香氛設置對場所好感度的影響
Impact of Scent Installations on Venue Appeal



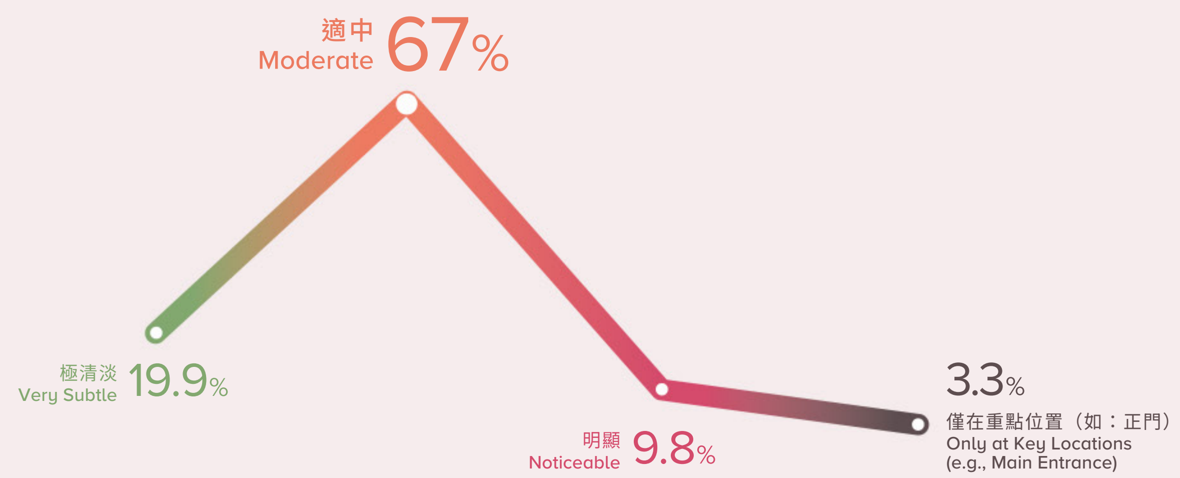
圖表 Chart 16 氣味對場所停留時間的影響
Effect of Scent on Time Spent at Venues



圖表 Chart 17 香氛設置對商場消費意欲的影響
Effect of Scent Installations on Shopping Mall Purchase Intent



圖表 Chart 18 對商場或酒店香氛強度的偏好
Preferred Intensity of Scent in Shopping Malls or Hotels



科技創新驅動香氛發展

Technological Innovation Driving Fragrance Development

第五部份
SECTION
5

消費者在創新科技與傳統體驗之間展現兼容並蓄的態度

The consumers are balancing openness to innovation with an appreciation for traditional experiences

在科技持續推進的環境下，香氛產業正迎來創新與轉型的多重挑戰與機遇。調查結果顯示，80.1%的受訪者表示願意參與實體香氣體驗裝置，突顯五感體驗在消費者心中的重要地位，並直接反映市場對線下互動體驗的認可與重視。相比之下，目前僅有10.5%的受訪者在港澳地區曾透過AR或VR等方式參與虛擬香氛體驗，88.4%的受訪者尚未接觸相關科技，說明虛擬香氛體驗雖處於起步階段，卻具備明顯的成長潛力。針對AI及智慧調香設備等創新技術，75.2%的受訪者表現出高度開放態度，願意嘗試個人化的定制香氣體驗，仍有10.2%接受程度不高，14.6%則傾向傳統調香方式。

整體而言，數據反映消費者在創新科技與傳統體驗之間展現兼容並蓄的態度，既樂於探索科技帶來的新可能，同時亦重視親身體驗。未來，如何於創新與傳統之間取得平衡，並進一步融合人性化設計與科技應用，將成為推動香氛產業可持續發展的關鍵。

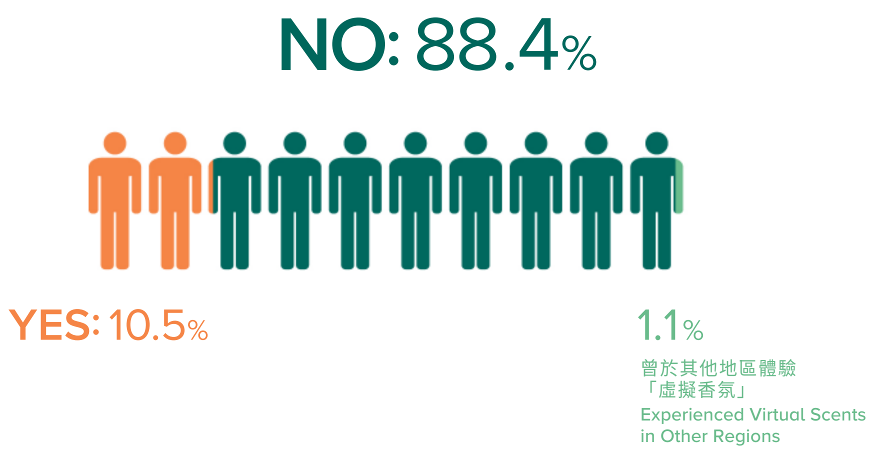
In the context of ongoing technological advancement, the fragrance industry is facing a multitude of challenges and opportunities related to innovation and transformation. Survey results indicate that 80.1% of respondents are willing to participate in physical scent experience devices, highlighting the significance of multisensory engagement for consumers and reflecting the market's recognition and appreciation of offline interactive experiences. In contrast, only 10.5% of respondents in Hong Kong and Macau have experienced virtual scents via AR or VR devices, while 88.4% have yet to encounter such technologies. This suggests that, although virtual scent experiences are still in their infancy, they have considerable growth potential.

Regarding innovative technologies such as AI-customized fragrance devices, 75.2% of respondents expressed a strong willingness to try personalized fragrance solutions. However, 10.2% reported a low level of acceptance, while 14.6% still prefer traditional fragrance creation methods.

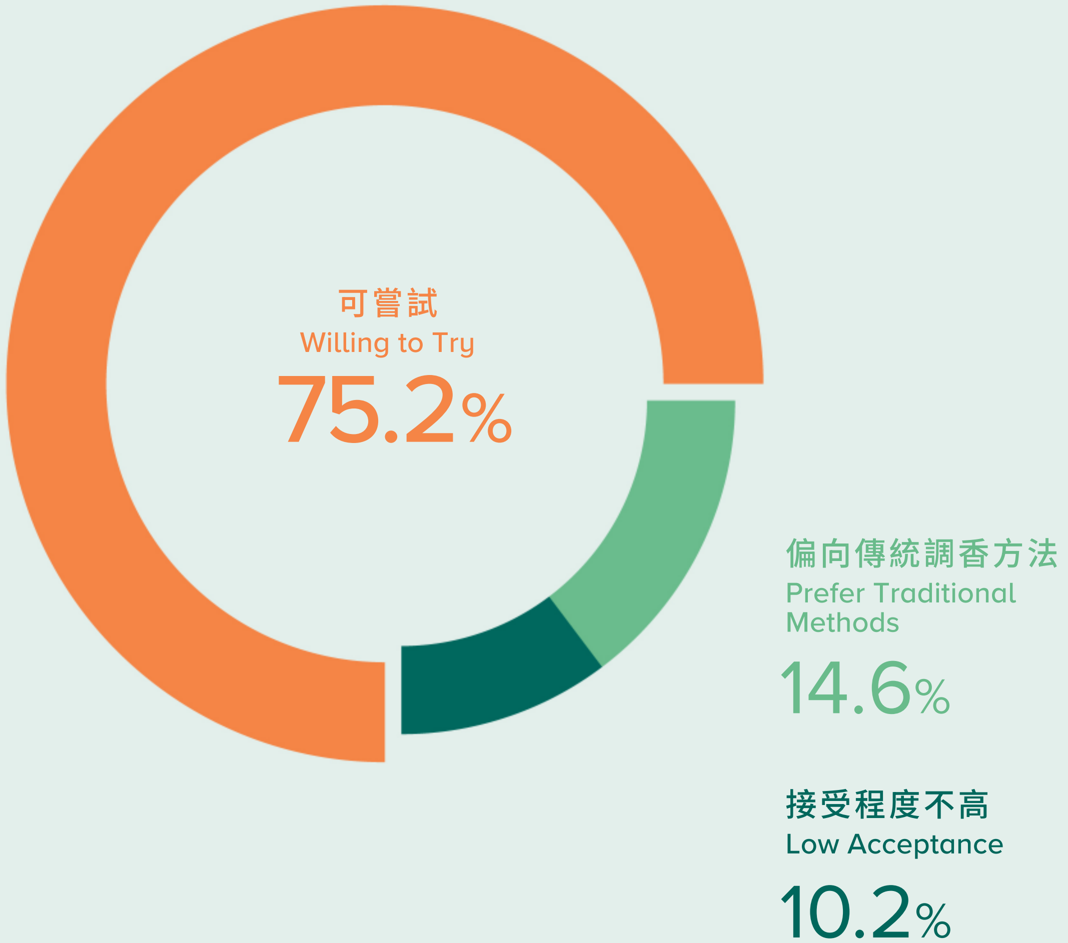
Overall, the data indicate that consumers are balancing openness to innovation with an appreciation for traditional experiences. While they are eager to explore the opportunities that technology offers, they continue to value hands-on, personal interaction. Moving forward, achieving a harmonious balance between innovation and tradition and further integrating human-centric design with technological applications will be crucial for the sustainable development of the fragrance industry.

圖表 Chart 19 實體香氣體驗裝置對參與意願的影響
Impact of Physical Scent Experience Devices on Willingness to Participate

圖表 Chart 20 在香港或澳門使用AR/VR設備體驗虛擬香氛的情況
Experience with Virtual Scents via AR/VR Devices in Hong Kong or Macau



圖表 Chart 21 對AI定制香氛等智慧科技融入香氛體驗的接受程度
Acceptance of Smart Technologies such as
AI-Customized Fragrance Devices in Scent Experiences



香氛產業的可持續發展

Sustainability in the Fragrance Industry

第六部份
SECTION

6

消費者對香氛產業可持續發展的期望穩步提升

The consumers' steadily rising expectations for sustainable development in the fragrance industry

在全球綠色轉型與環境意識日益提升的背景下，香氛產業的可持續發展成為焦點議題。調查結果顯示，53.5%的受訪者對天然成分香氛「可以了解」，22.9%表示「很大興趣」，反映市場對天然原料的認知及需求正逐漸提升。對於香氛空瓶回收機制，目前僅16.7%的受訪者曾參與。

品牌在可持續發展的定位，對消費者購買決策產生明顯影響，高達60.3%的受訪者表示會因而考慮，顯示社會責任與環保形象已成為行業競爭力的因素之一。產品層面上，當環保香氛因不採用部分合成成分而影響留香時間時，53.9%的受訪者可接受，41.3%表示需要考慮，僅有4.8%無法接受，反映大多數消費者對環保成分具一定包容度。至於可持續包裝帶來的價格調整，46.5%受訪者表示願意接受，53.5%則不願意，顯示消費者雖認同綠色理念，價格因素仍屬考量重點。

整體而言，數據反映消費者對香氛產業可持續發展的期望穩步提升，既重視品牌環保價值與社會責任，同時亦期待產品品質與價格合理，如何在滿足市場需求的同時實現產業可持續發展，是產業未來的重要課題。

Amid the accelerating global shift toward sustainability and growing environmental awareness, sustainable development has become a core priority for the fragrance industry. Survey data show that 53.54% of respondents are open to learning more about fragrances made with natural ingredients, while 22.91% express strong interest, demonstrating increasing market recognition of and demand for natural raw materials. However, participation in fragrance bottle recycling programs remains low, with only 16.71% of respondents having engaged in such initiatives, highlighting the need for continued brand promotion and further process optimization.

A brand's commitment to sustainability clearly impacts purchasing decisions, with 60.89% of respondents stating that it influences their choices. This underscores how corporate social responsibility and a sustainable brand image have become critical components of industry competitiveness. At the product level, 53.9% of respondents are receptive to eco-friendly fragrances with reduced longevity due to the exclusion of certain synthetic ingredients, while 41.3% would consider this trade-off and only 4.8% find it unacceptable, indicating broad consumer tolerance for sustainable formulations. However, when it comes to price increases associated with sustainable packaging, only 46.5% of respondents are willing to pay more, whereas 53.5% are not. These findings underscore that, despite growing support for environmental initiatives, price remains a major factor in purchase decisions.

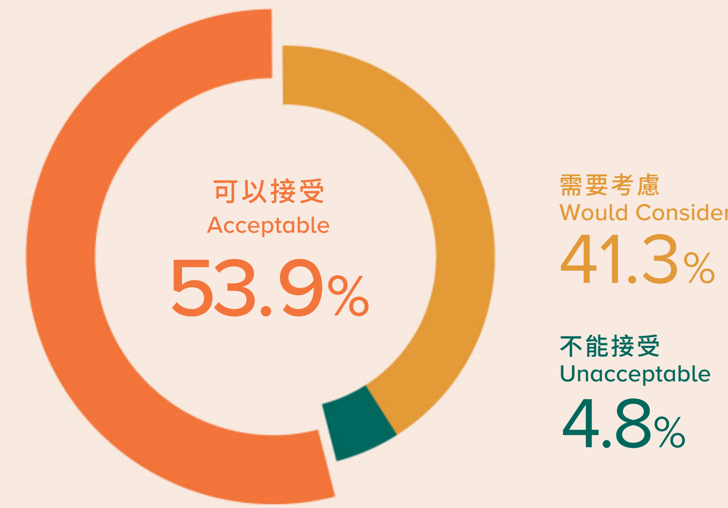
Overall, the data reflect consumers' steadily rising expectations for sustainable development in the fragrance industry. Consumers increasingly value brands' environmental commitments and social responsibility, yet also expect product quality and reasonable pricing. How the industry can achieve sustainability while meeting market demands remains a key challenge for the future.

圖表 Chart 22 對天然成分香氛產品的興趣程度
Interest in Fragrance Products Made with Natural Ingredients

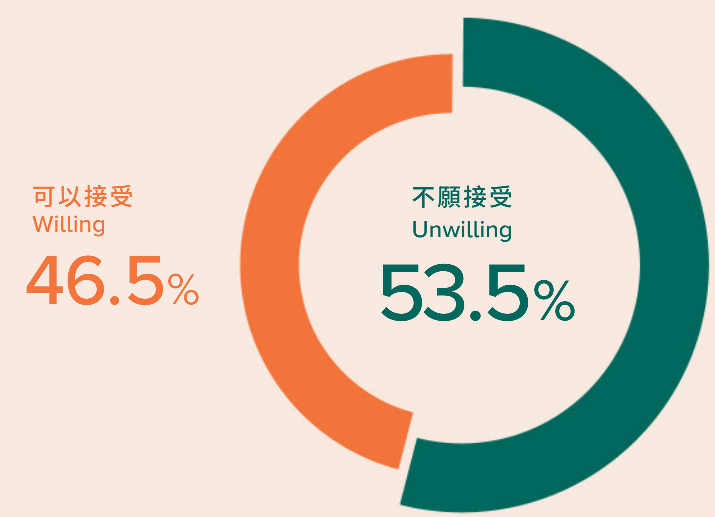
圖表 Chart 22 參與香氛空瓶回收計劃的情況
Participation in Fragrance Bottle Recycling Programs

圖表 Chart 24 可持續發展定位對購買決策的影響
Impact of Sustainability Positioning on Purchase Decisions

圖表 Chart 25 對環保香氛產品留香時間較短的接受程度
Acceptance of Shorter Lasting Time in Eco-Friendly Fragrance Products



圖表 Chart 26 對可持續包裝導致價格上漲的接受意願
Willingness to Accept Price Increases Due to Sustainable Packaging



受訪者基本資料
Respondent Demographics

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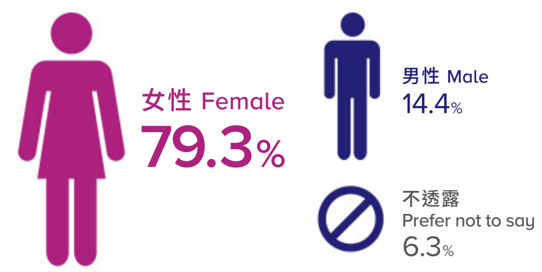
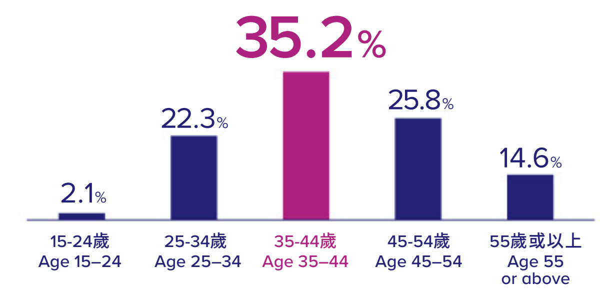
SECTION
7

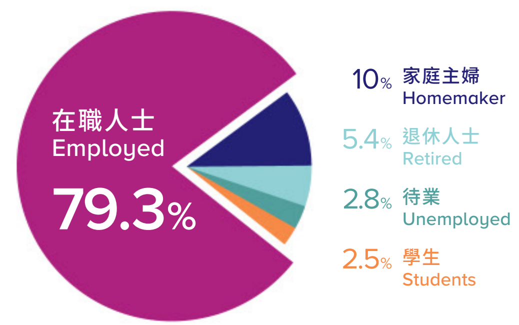
性別 Gender



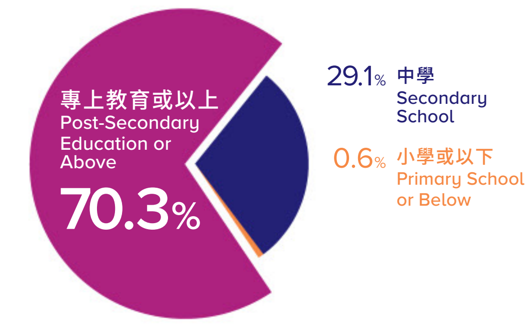
年齡 Age



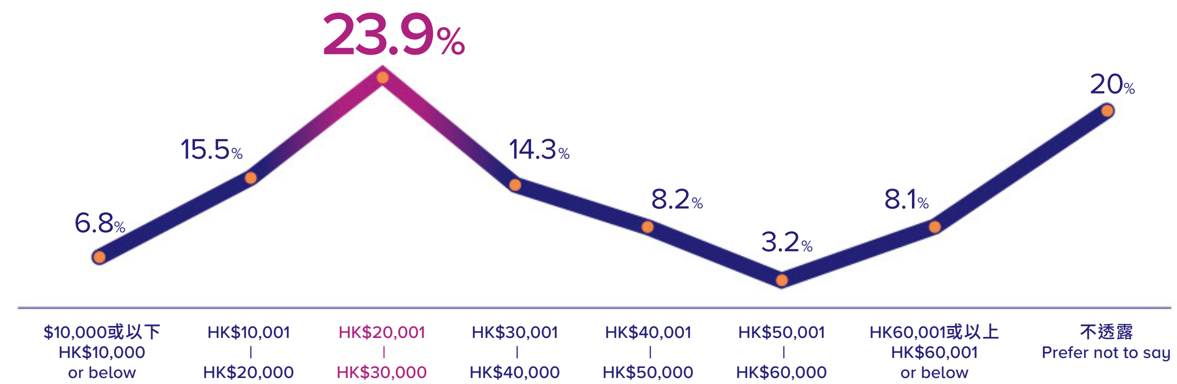
就業狀況 Employment Status



教育程度 Education Level



個人每月總收入 Monthly Personal Income



市場機遇及挑戰
Market Opportunities and Challenges

第八部份
SECTION
8

市場機遇
Market Opportunities

消費滲透率持續提升

超過八成港澳消費者將家居香氛融入日常生活，較2024年調查上升9個百分點，普及程度顯著提升。隨著需求升級及消費層面的持續擴展，香氛市場展現出長遠發展潛力。

多元需求推動細分市場擴展

香氛消費在港澳市場日益體現個人化傾向，多元需求帶動小眾品牌迅速興起。精油、室內擴香、香氛蠟燭及車用香氛等產品，能有效切合消費者在情緒調節、提升睡眠品質及營造空間氛圍等多元場景下的需求。由此可見，功能型香氛產品具備顯著增長潛力，為品牌針對目標群組推出新產品線創造契機，並有助進一步拓展新興細分市場。

情緒價值興起

近八成消費者認為香氛有助情緒調適、壓力舒緩及自我療癒，顯示香氛產品的應用已從單純氣味裝飾，逐步延伸至情感價值層面。品牌如能善用情感行銷與故事包裝，並結合與本地零售、商業空間、藝術等不同領域跨界合作，有助拓展市場覆蓋層面，並觸及更廣泛的消費群體。

Rising Consumer Penetration

Over 80% of consumers in Hong Kong and Macau now incorporate home fragrances into their daily routines, representing a 9% increase compared to the 2024 survey and reflecting a significant rise in overall market penetration. As consumer demand increases and the user base expands, the fragrance market demonstrates considerable long-term growth potential.

Diverse Needs Drive Submarket Expansion

Fragrance consumption in Hong Kong and Macau is becoming increasingly personalized, as diverse consumer needs drive the swift growth of niche brands. Products such as essential oils, diffusers, scented candles, and automotive fragrances effectively address a wide array of consumer needs, from emotional regulation and enhanced sleep quality to creating inviting atmospheres for various occasions. This trend highlights strong growth potential for functional fragrance products, offering brands opportunities to introduce targeted product lines and capitalize on emerging niche segments.

The Evolving Value of Fragrance: Emotional Wellness

Nearly 80% of consumers believe that fragrances contribute to emotional balance, stress relief, and self-care, highlighting a shift from simply enhancing ambient scent to delivering deeper emotional value. Brands that harness emotional marketing and compelling storytelling—while cultivating cross-sector collaborations with retail, commercial spaces, the arts and related industries, will be well-positioned to broaden their market presence and connect with a wider consumer audience.

可持續發展與綠色消費意識提升

逾六成消費者將環保及可持續發展納入選購考量，並對天然成分及可回收包裝產品表現出一定關注。香氛品牌持續推動綠色行銷，有助提升市場競爭力及品牌形象。

科技創新與個人化引領產品升級

消費者普遍對科技創新帶來的新型香氛體驗持開放態度，包括AR、VR虛擬香氛體驗及AI智能調香裝置等創新技術，有助進一步推動產品研發與個人化需求升級。

Growing Awareness of Sustainability and Green Consumption

More than 60% of consumers consider environmental protection and sustainability as key factors in their purchasing decisions, with heightened interest in natural ingredients and recyclable packaging. Ongoing investment in green marketing by fragrance brands enhances market competitiveness and strengthen brand equity.

Technological Innovation and Personalization Drive Product Upgrades

Consumers are demonstrating growing acceptance of innovative fragrance experiences powered by technology, including AR and VR immersive scent devices as well as AI-driven fragrance customization systems. These advancements are accelerating product development and propelling the industry toward increasingly personalized and adaptive fragrance solutions.

挑戰
Challenges

香氛體驗以實體主導 加強全渠道協同效應

實體零售與親身體驗仍是消費決策的關鍵因素，但線上資訊及內容的影響力不斷增加。品牌應加快建立全渠道體驗，並進一步推動線上線下深度融合與協同，優化消費者於各平台的一致體驗。現時，KOL分享及媒體廣告對消費決策的直接影響較低，建議市場推廣策略應根據消費者的決策考慮因素作出調整。

商業空間香氛應用差異顯著 品牌辨識度需提升

雖有超過四成三受訪者能明確辨識K11商場的香氛設置並聯繫到其品牌形象，但其他商場及酒店空間的香氛辨識度相對較低。這反映整體市場在提升香氛應用的一致性及加強場所與品牌聯想度方面，仍面臨挑戰。

綠色消費教育與參與度有待提升

雖然天然原料及環保議題日益受到重視，但實際參與香氛空瓶回收計劃的消費者比例僅約16%，逾半數消費者尚未準備為可持續包裝支付溢價，價格因素仍為部分消費者選購時的重要考量。這反映綠色消費相關的教育、推廣及回收機制仍有顯著提升空間。

Marked Disparities in Fragrance Branding Across Commercial Spaces; Brand Recognition Needs Improvement

While more than 43% of respondents can readily identify the fragrance installations at K11 Shopping Mall and associate them with its brand image, recognition of scent branding in other malls and hotels remains lower. This highlights ongoing challenges in achieving consistency in fragrance application and in reinforcing the connection between spatial scenting and brand identity across the wider marketplace.

In-Person Fragrance Experiences Dominate; Need for Stronger Omnichannel Integration

Physical retail and in-person experiences continue to be critical in driving consumer decision-making, although the influence of online information and content is steadily increasing. Brands should accelerate the development of seamless omnichannel experiences by deepening the integration and synergy between online and offline platforms, thereby optimizing a consistent consumer journey across all touchpoints. Currently, key opinion leader endorsements and media advertising have comparatively limited direct impact on purchase decisions, suggesting that marketing strategies should be realigned according to the actual drivers of consumer choice.

Green Consumption Education and Engagement Require Strengthening

Despite growing interest in natural ingredients and sustainability, only around 16% of consumers have participated in fragrance bottle recycling programs, and more than half remain willing to pay a premium for sustainable packaging. Price continues to be a primary consideration for many consumers. These findings underscore substantial opportunities to enhance consumer education, promotional initiatives, and recycling infrastructure in support of green consumption.

總結
Conclusion

總結而言，香氛行業正邁向多層次、多元化的發展階段，消費者對產品的日常化、情緒價值及個人化需求逐漸成為市場主流，推動消費群體與應用場景持續擴展，整體市場滲透率有所提升。

展望未來，香氛產業預計將進一步聚焦於全感官體驗、可持續發展、科技創新及個人化服務。品牌可考慮加強與零售、商業空間、藝術等多領域合作，並結合健康經濟、生活美學及綠色循環等趨勢，推動產業鏈協同發展，不斷優化零售體驗和全渠道融合，持續滿足消費者多元化需求，促進香氛產業的穩定發展。

In summary, the fragrance industry is progressing toward a new stage of multifaceted and diversified development. Everyday use, emotional value and personalized demands are increasingly shaping mainstream consumer preferences, further expanding both the user base and application scenarios and driving higher overall market penetration.

Looking ahead, the industry is expected to place greater emphasis on holistic sensory experiences, sustainability, technological innovation, and personalized services. Brands may consider deepening collaborations with the retail sector, commercial spaces, the arts, and other fields, while incorporating emerging trends such as health consciousness, lifestyle aesthetics, and green circularity. Collectively, these efforts will support coordinated growth across the value chain, continually enhance the retail experience and omnichannel integration, and enable the industry to better address diverse consumer needs, thereby fostering the stable and sustainable development of the fragrance sector.

鳴謝
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新傳媒集團
New Media Group

有關穎通控股有限公司
About Eternal Beauty Holdings Limited

穎通控股有限公司（穎通集團）是中國（包括香港及澳門）最大的香水集團（除品牌所有者香水集團外，按2023年零售額計），主要從事銷售及分銷從第三方品牌授權商採購的產及為該等品牌授權商進行市場部署，例如為其品牌設計及實施定製的市場進入及擴張計劃。穎通控股擁有龐大且多元化的品牌組合，不僅包括香水，還包括彩妝、護膚品、個人護理產品、眼鏡及家居香氛。截至2025年6月10日，穎通控股為合共72個外部品牌進行產品分銷及市場部署，包括 Hermès 、Van Cleef & Arpels、Chopard、Albion 及 Laura Mercier，涵蓋多元化的定價層次及功能，迎合中國內地、香港及或澳門消費者的差異化需求。

Eternal Beauty (Eternal Group) is the largest perfume group (apart from brand-owner perfume groups) in China (including Hong Kong and Macau) in terms of retail sales in 2023. It primarily sells and distributes products procured from third-party brand licensors, and deploys market for these brand licensors, offering such services as brand management, and designing and implementing customized market entry and expansion plans for their brands. The Group boasts large and diversified brand portfolios that include not only perfumes, but also color cosmetics, skincare products, personal care products, eyewear and home fragrances. As at 10 June 2025, it conducted product distribution and market deployment for a total of 72 external brands, including Hermès, Van Cleef & Arpels, Chopard, Albion and Laura Mercier, with products in different pricing tiers and of versatile features that meet the differentiated demands of consumers in mainland China, Hong Kong and/or Macau.

有關國際香氛協會
About International Fragrance Association

成立於2024年的國際香氛協會由 Eternal Group 創辦，致力於豐富香氛藝術和文化，培育大眾對香氛與藝術、歷史和創新的鑑賞力。透過香氣的變革力量，促進香港多元文化中的包容和凝聚力，並以引領者和推動者的身份激勵社會變革和共融，跨越文化壁壘，以熱情擁抱香氣。

Established in 2024, the International Fragrance Association, founded by the Eternal Group, is dedicated to enriching the art and culture of fragrances. It aims to cultivate a deeper understanding and appreciation among the public for the intricate relationship between scents and art, history, and innovation. Through the influential force of fragrances, the foundation strives to promote inclusivity and unity within the diverse cultural tapestry. Embracing its role as a trailblazer and advocate, the foundation seeks to ignite societal transformation and harmony, transcending cultural barriers with a fervent embrace of the world of fragrances.

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