

## PERFUMES – EXPORT MARKETS & POTENTIAL

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(SECTOR REPORT)



Export Initiatives & Partnerships Division,  
Phone: +9714-4455333; Fax: +9714-4455355  
E-mail: [info@dedc.gov.ae](mailto:info@dedc.gov.ae); Web: [www.dedc.gov.ae](http://www.dedc.gov.ae)  
PO Box 123336, Dubai – UAE

Primary Information Sources: ITC Trade Map & Dubai Customs Dept.

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T +971 4 4455333  
F +971 4 4455355

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Dubai Exports

PO Box 123336 Dubai  
United Arab Emirates

مؤسسة دبي  
لتنمية الصادرات  
صندوق بريد 123336 دبي  
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## Executive Summary

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Perfumes are composed of fragrances or essential oils which are used to provide a pleasant smell. According to the latest report titled “Perfume Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2019-2024”, the global perfume market reached a value of US\$ 38.8 Billion in 2018. The global perfume market is gaining traction owing to the rising trend of personal grooming along with the increasing demand for youth-oriented as well as exotic fragrances. Moreover, the product diversification by manufacturers is attracting a larger consumer-base. Apart from this, increasing consumer spending on luxury fragrances on account of inflating income levels and improving standards of living are further boosting the sales of perfumes. Other major factors propelling the demand for perfumes worldwide are rapid urbanization, increasing population and aggressive advertising by the manufacturers. However, the availability of counterfeit products represents one of the major challenges faced by the market. Looking forward, the market value is projected to reach US\$ 48.0 Billion by 2024, at a projected CAGR of 3.6% over the forecast period.

Source: Extract from [https://www.researchandmarkets.com/research/7qcx8/global\\_perfume?w=5](https://www.researchandmarkets.com/research/7qcx8/global_perfume?w=5)

According to Euromonitor research, Arab scents such as oud, musk and amber from well-known regional brands such as Arabian Oud, Abdul Samad Al Quraishi, Ajmal and Rasasi, among others continue to be favoured in the UAE. Western fragrances also continue to be popular among the different nationalities in the UAE and we at Dubai Exports believe that brand loyalty, product popularity internationally, quality of the fragrance (longevity & sillage) continue to play strong roles in attracting customers.

According to ITC Data ([www.trademap.org](http://www.trademap.org)), in 2018, the global import value of this product (HS 3303) was nearly USD 19.4 Billion. Top 10 global importing markets were USA 13% of global imports); Germany (9.6%); UK (6.2%); Netherlands (5.1%); Singapore (4.7%), Spain (4.4%), UAE (@4% each); Hong Kong & Italy (@2.9% each) and Russia (2.7%). It should be noted here that UAE, Hong Kong -China and Singapore are mainly re-export centres, catering to either the Middle East or the other Far East countries and this product is imported significantly (> USD 5 Million) by more than 100 countries. (See charts). Top exporters of this product worldwide (2018), were France, Spain, Germany, USA, Italy, Singapore, Netherlands, UK, Poland and Belgium.

According to data from Dubai Customs Department, 77.2% of Dubai’s 2018 Re-exports (AED 2.9 Billion) of this product were to the following countries – USA, KSA, Kuwait, Switzerland, Oman, Iran, Netherlands, Singapore, Czech Republic, Bahrain, Lebanon, Jordan, Kirghizia, Iraq & Pakistan. The following countries comprised 69% of the direct exports (AED 916 Million) from Dubai in 2018 – Oman, KSA, Iraq, USA, Pakistan, Kuwait, India, Nigeria, Egypt, Kenya, UK, Tanzania, Sudan, Somalia & Iran.

A close look at ITC’s Export Potential Map (<http://exportpotential.intracen.org>) shows that countries/regions like USA, Europe, Middle East as well as China/ East Asia have billions of dollars’ worth of untapped potential while UAE itself has the potential to directly export more than USD 1 Billion to GCC itself, followed by additional

untapped potential in East & South Asia. (See graphs attached). At Dubai Exports, we believe that while pushing for increased exports to the existing two large markets of the **GCC and South Asia** through DE Overseas offices in Saudi Arabia and India, efforts should also be made to explore the **East Asian and European** markets through our offices and partners in Hong Kong, China and Germany.

## Technical Standards & Requirements for Import

Although regulations applicable to cosmetic products are increasingly being harmonized to reduce international barriers to trade, there are still some important differences to note when marketing cosmetics in major markets around the world. Some of the specific requirements in selected countries include:

1. **USA** – Cosmetic products for sale in the U.S. are regulated by the U.S. Food & Drug Administration (FDA) under the provisions of the Federal Food, Drug & Cosmetic Act and the Fair Packaging & Labeling Act. Cosmetic products are not subject to pre-market review and approval but manufacturers are responsible for substantiating the safety of their products and ingredients, and providing consumers with complete and accurate information on the same. An exception is where there is use of colour additives. Routine inspections of imported products are carried out to ensure compliance and includes checks on misbranding and adulteration.
2. **European Union** – As of 2013, cosmetics sold within the EU need to adhere to Regulation # 1223/2009. Cosmetic products are not subject to pre-market approval and market surveillance by authorities is followed to check compliance. EU requirements prohibit the use of substances determined to be carcinogenic, mutagenic or toxic. The regulation also specifies colorants, preservatives and UV filters that are approved. The regulation prohibits the performance of animal testing.
3. **China** – In 2018, China's SFDA was merged into a new agency, the State Administration for Market Regulation (SMRA) which has authority over issues related to safety, certification, testing of cosmetics.
4. **ASEAN** – Countries in this group are signatories to the ASEAN Harmonised Cosmetic Regulatory Scheme which aims to reduce pre-market approvals especially in intra-ASEAN trade.
5. **INDIA** – Cosmetic products here are primarily regulated by the Drugs & Cosmetics Act 1940 and Rules 1945 (D&CA). As of 2011, all cosmetic products imported must be pre-registered with that country's Central Drug Standards Control Organization, where the ingredients and chemical composition of finished product need to be declared. India is also considering a ban on animal testing like the EU.

Source: *White Paper on Requirements on Cosmetic Products in the Global marketplace* - [www.tuvsud.com](http://www.tuvsud.com)

Exporters from Dubai are advised to contact DE head office ([info@dedc.gov.ae](mailto:info@dedc.gov.ae)) for any specific requirement so that the same can be ascertained through our offices in the Middle East, Asia, Americas or Europe.

*Note: DE Partners, SGS and Intertek provides inspection and certification services for exporters through Dubai. For further information on Import standards/ regulations, regulated or prohibited products, you may contact us or them (see below)*

- ❖ Husny Saeed, Intertek International Ltd., Tel: +971 4 3178777/+971 4 3316883, Email: [info.dubai.gs@intertek.com](mailto:info.dubai.gs@intertek.com) OR
- ❖ Sithara Hatim; SGS Gulf Ltd., Jebel Ali Branch; T: 9714 8809393 (Ext 249); E: [sithara.hatim@sgs.com](mailto:sithara.hatim@sgs.com); [www.sgs.com](http://www.sgs.com)

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F +971 4 4455355

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## Customs Duties & Tariff

Market Access Map provides information about customs tariffs (including tariff preferences) applied by more than 200 countries. It also covers tariff rate quotas, trade remedies, rules and certificates of origin, bound tariffs of WTO members, non-tariff measures and trade flows to help users prioritize and analyze export markets as well as prepare for market access negotiations. Market Access Map is free to users in UAE.

Source: <https://www.macmap.org/Default.aspx>

### Market Access Map - Import Tariff for Perfumes (HS 3303) in Select Markets

Importer	HS Code	Tariff regime	Applied tariff (as reported)	Applied tariff (converted)	Total AV equivalent tariff
GCC	3303	Preferential tariff for UAE	0%	0%	0%
China	3303	MFN duties (Applied)	3%	3%	3%
Singapore/ Hong Kong	3303	MFN duties (Applied)	0%	0%	0%
France/EU/ USA	3303	MFN duties (Applied)	0%	0%	0%
Russia	3303	MFN duties (Applied)	6.5%	6.5%	6.5%
Georgia	3303	MFN duties (Applied)	0%	0%	0%
Indonesia	3303	MFN duties (Applied)	10%	10%	10%

Source: <https://www.macmap.org/Default.aspx>

### Potential Buyers in Select markets (HS 3303)

The International Trade Centre's "Trade Map Tool" ([www.trademap.org](http://www.trademap.org)) provides useful information about importing and exporting companies for 133 countries. The list of potential buyers of products as acquired through ITC database are large in some countries (e.g. Germany) while practically non-existent in others. The following 3 pages indicate some potential buyers in Saudi Arabia, China and Kenya for Perfume products. For further assistance regarding "potential" buyers from on specific products produced/sold by our exporters, please contact DE Head office to obtain further contact information through our overseas offices or register with ITC and browse the information available. Source: <https://www.trademap.org>

## List of Potential Importing companies in Saudi Arabia for :

Product category : Toilet preparations/ Perfumes

Company name	City
ABBOTT LABORATORIES	Riyadh
Abdullah & Said M.O. Binzagr Co. - Avon Division Saudi Arabia	Jeddah
Al Dewan Plastic Factory - Dewan Pack	Riyadh
AL HAYAT FACTORY FOR MEDICAL PRODUCTS EST	Dammam
AL KHURAJI FACTORY FOR PERFUMES AND COSMETICS EST	Riyadh
Al Mabkharah Trading Co Ltd - Al Mabkharah Trading Group	Riyadh
Al Rajhi Chemical Industries Est - Al Alamyra Chemicals Est	Riyadh
Al Rehab Modern Factory - Al Rehab Modern Factory For Perfumes	Jeddah
AL SAIDI FACTORY FOR CLEANING PRODUCTS	
ARABIAN CO FOR OUD AND ORIENTAL PERFUMES TRADING	Riyadh
BAGADER COMMERCIAL COMPANY LTD	Jeddah
Bahrawi Trading Company - Btc	Jeddah
BATTERJEE MEDICAL SERVICES	Riyadh
Bawazir Toothpaste Factory - Meswak Of Saudi Arabia	Jeddah
BINZAGR UNILEVER CO LTD	Jeddah
Henkel Saudi Arabia Detergent Co Ltd - Henkel Dac	Riyadh
JAWHARAT AL SURRATI FACTORY FOR PERFUMES AND COSMETICS LTD	Makkah Al Mokarmah
KHALID AL QASSIM EST	Riyadh
Medical And Cosmetic Products Co Ltd - Mpcp	Riyadh
MISHAL & MAJED MUZAFFER TRADING COMPANY	Makkah Al Mokarmah
MODERN ARABIAN CRYSTAL INDUSTRIES CO. LTD	Jeddah
Modern Industries Company - Mic	Dammam
Mohammed Alkhurajji Factory For Perfumes And Cosmetics - Alkhurajji Factory For Perfumes And Cosmetics	Riyadh
MUNTAJAT VETERINARY PHARMACEUTICAL FACTORY CO	Dammam
MUSAED NASSER AL OBAID FOR TRADING EST	Riyadh
Nadrah Trading Establishment - Banafa Arabian Perfumes Industry	Jeddah
National Cleaning Products Company Ltd - Clorox	Dammam
Omer Banafa For Oud Factory - Bo	Jeddah
PERFUMES OF ARABIA LTD	Jeddah
RAWA'EH AL-TABEE'A OIL & COSMETICS FACTORY	Riyadh
Reza Chemical Industries - Rci	Jeddah
SAFCO DETERGENTS	Riyadh
SALEH AHMED BIN AFIF COSMETIC FACTORY	Jeddah
Sarmada Trading Limited Company - Sarmada Trading	Jeddah
Saudi Industrial Detergents Co - S I D C O	Dammam
ULTRAPAK MANUFACTURING COMPANY LIMITED	Jeddah

Source: <https://www.trademap.org>

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## List of Potential importing companies in China for :

Product category : Toilet preparations/ Perfumes

Company name	City
Alberto-culver Cosmetics Products (Shenzhen) Co., Ltd.	Shenzhen
American Hygienics Corporation	Shanghai
Amway (China) Co., Ltd.	Guangzhou
Artec Chemical Company Limited	Xiamen
Baiyuan Family Products (Shenzhen) Co.,Ltd.	Shenzhen
Bawang (Guangzhou) Co., Ltd.	Guangzhou
BeautyCos International Co., Ltd.	Suzhou
Beautylux International Cosmetics (Shanghai) Co.,Ltd.	Shanghai
Beiersdorf Daily Chemical (Guangzhou) Co., Ltd.	Conghua
Beiersdorf Daily Chemical (Wuhan) Co. Ltd.	Wuhan
Beiersdorf Daily Chemical (Wuhan) Co. Ltd. - Sibao Fine Chemical (Wuhan) Co., Ltd. Dunkou Branch	Wuhan
Beijing Dabao Cosmetics Co., Ltd.	Beijing
Beijing LG Household Chemical Co., Ltd.	Beijing
Beijing Toto Co., Ltd.	Beijing
Boujuior (Shanghai) Cosmetics Co., Ltd.	Shanghai
BRAUN (SHANGHAI) LTD.	Shanghai
C-Bons Industrial (Wuhan) Co., Ltd.	Wuhan
Coscentra Shanghai Cosmetics Co., Ltd.	Shanghai
Daisen (Shanghai) Co., Ltd.	Shanghai
Dongguan Aimeishi Cosmetic Co., Ltd.	Dongguan
Doo Jung (China) Factory	Shenzhen
E.Excel (Shanghai) Co., Ltd.	Shanghai
Foshan Shunde Area Soshio Wet Tissue Co.,Ltd.	Foshan
Frog Prince (China) Daily Chemicals Co., Ltd.	Zhangzhou
Gelian (Zhongshan) Chemical Industrial Co., Ltd.	Zhongshan
Givaudan Fragrances (Shanghai) Ltd.	Shanghai
Global Cosmetics (China) Company Limited	Dongguan
Guangzhou Botny Chemical Co., Ltd.	Conghua
Guangzhou Hualing Chemical Products Co.,Ltd.	Guangzhou
Guangzhou Santong Cosmetics Co., Ltd.	Guangzhou
Hangzhou LG Cosmetics Co., Ltd.	Hangzhou
Hawley & Hazel Chemical Company (Zhongshan) Limited	Zhongshan
Hawson (Fujian) Sanitary Ware Co., Ltd.	Quanzhou

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## List of importing companies in Hong Kong, China

Product category : Perfumes and perfumery products

Company name	City	Website
Asia Pacific Beauty Products Limited	Tsim Sha Tsui	<a href="http://www.asiapacific-beauty.com/">http://www.asiapacific-beauty.com/</a>
Estee Lauder (Hong Kong) Limited	Tsim Sha Tsui	<a href="http://www.elcompanies.com">http://www.elcompanies.com</a>
Eternal Optical & Perfumery (Far East) Ltd	Kowloon Bay	<a href="http://www.eternal-op.com.hk/">http://www.eternal-op.com.hk/</a>
Givaudan Hong Kong Limited	Causeway Bay	<a href="http://www.givaudan.com">http://www.givaudan.com</a>
Guerlain (Asia Pacific) Limited	Quarry Bay	<a href="http://www.guerlain.fr/">http://www.guerlain.fr/</a>
LVMH Perfumes & Cosmetics Asia Pacific Limited	Quarry Bay	<a href="http://www.dior.com">http://www.dior.com</a>
Parlaine Company Limited	Mongkok	<a href="http://www.parlaine.com">http://www.parlaine.com</a>
Richemont Luxury Asia Pacific Ltd	Central	<a href="http://www.dunhill.com">http://www.dunhill.com</a>
Sa Sa Cosmetic Company Limited	Chai Wan	<a href="http://www.sasa.com">http://www.sasa.com</a>
Skyland Cosmetics International Limited	Kwun Tong	<a href="http://www.skyland.hk.com/">http://www.skyland.hk.com/</a>
Skyland Development (H.K.) Ltd.	Kwun Tong	<a href="http://www.isaknox.com.hk">http://www.isaknox.com.hk</a>
Sogo Hong Kong Co Ltd	Causeway Bay	<a href="http://www.sogo.com.hk/">http://www.sogo.com.hk/</a>
Strawberry Cosmetics (Services) Ltd	Shaukeiwan	<a href="http://www.strawberrynet.com">http://www.strawberrynet.com</a>
Tendfame Company Limited	San Po Kong	<a href="http://www.tendfame.com">http://www.tendfame.com</a>
Wai Kit Cosmetics Company Limited	Kwun Tong	<a href="http://www.wkco.com.hk">http://www.wkco.com.hk</a>

Source: <https://www.trademap.org>

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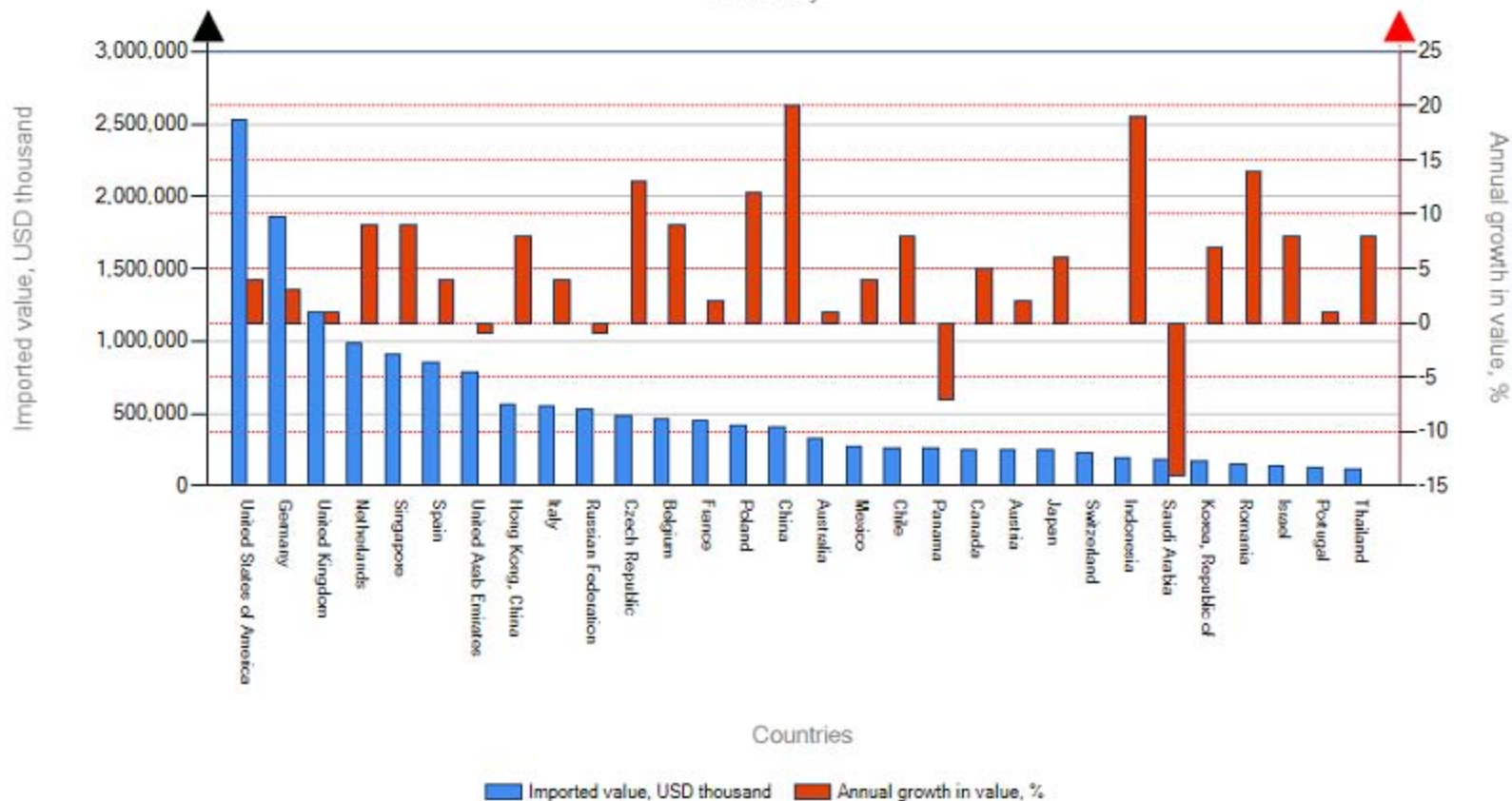
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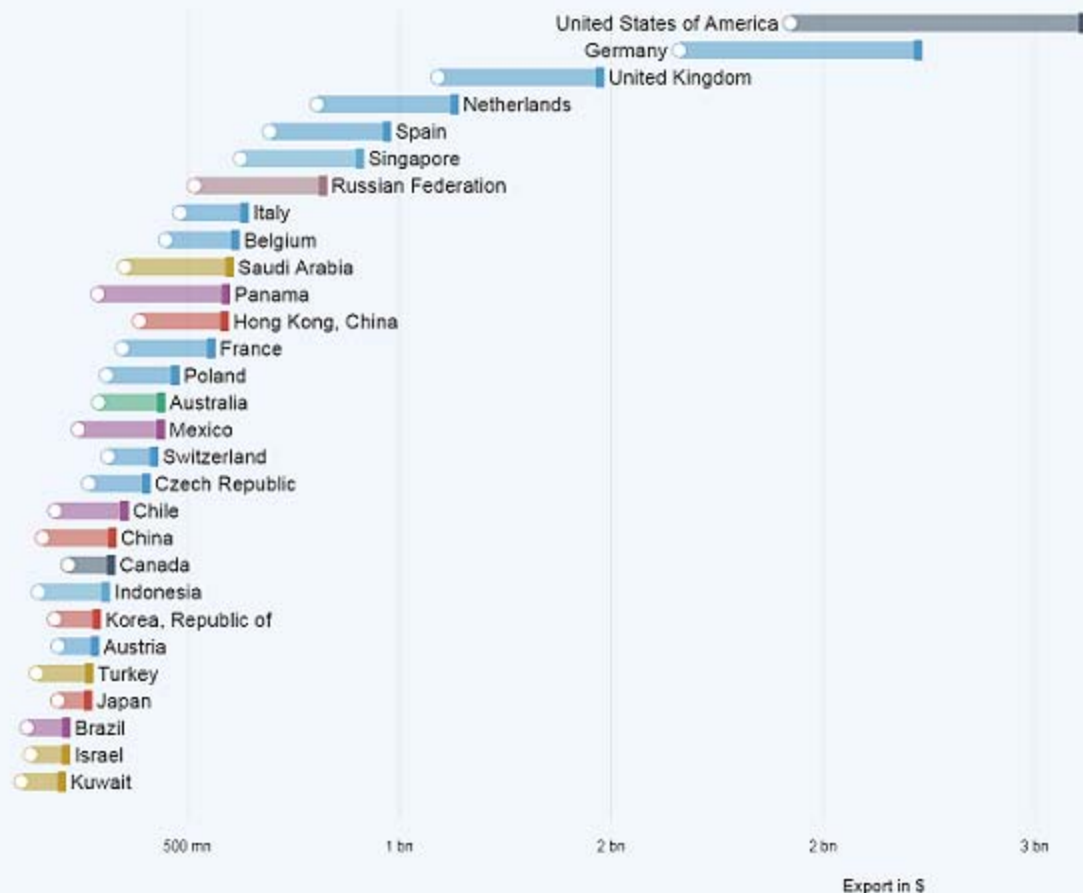
## List of importers for the selected product in 2018

Product : 3303 Perfumes and toilet waters (excluding aftershave lotions, personal deodorants and hair lotions)





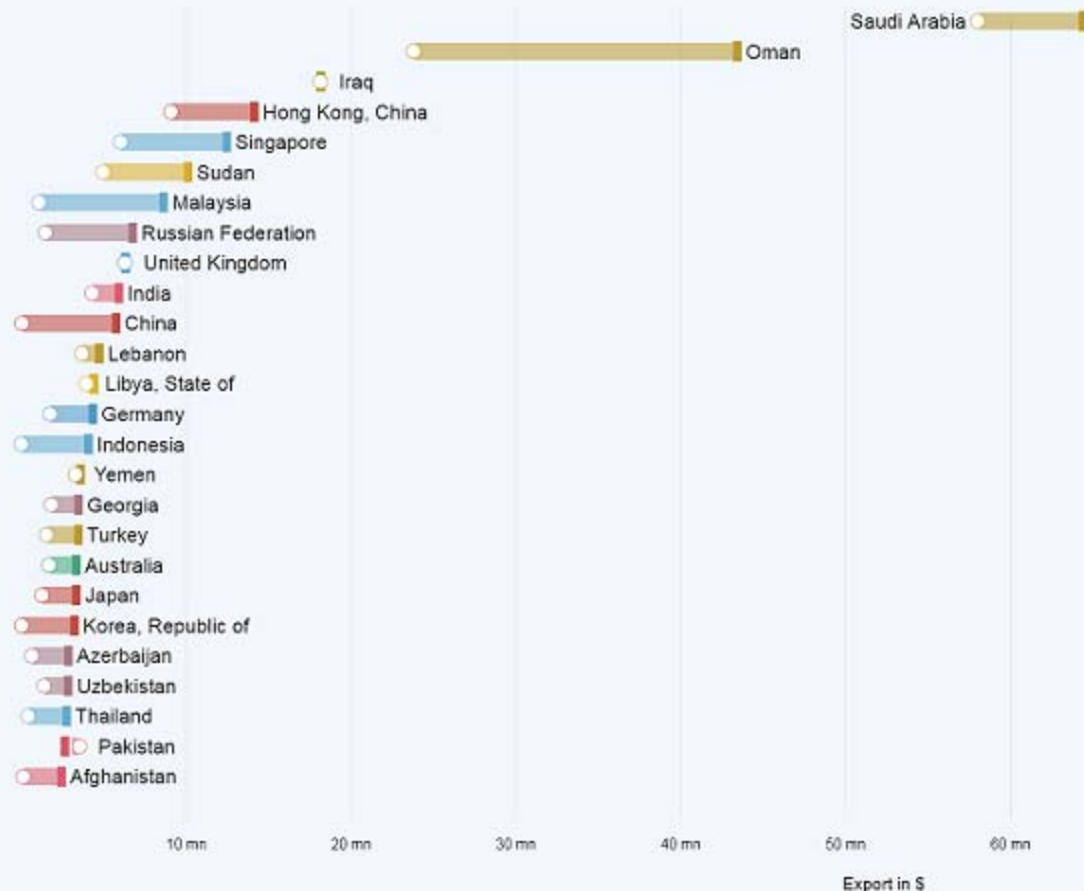
## Markets with potential of Perfumes & toilet waters, nes



### Legend

- Export potential
  - Actual exports
  - ◯ Potential to actual exports gap
- 
- EU & West Europe
  - North America
  - Latin America
  - East Asia
  - Middle East
  - ASEAN
  - East Europe & Central Asia
  - Pacific

## Markets with potential for United Arab Emirates's exports of Perfumes & toilet waters, nes



### Legend

- Export potential
  - Actual exports
  - Potential to actual exports gap
- Middle East
  - ASEAN
  - East Asia
  - East Europe & Central Asia
  - East Africa
  - EU & West Europe
  - South Asia
  - North Africa
  - Pacific