

Fragrance on Amazon India sells at least ₹216.6 crore a year. One Indian D2C brand takes a fifth.

FRAGRANCE · AMAZON INDIA · READ 2026-10-12

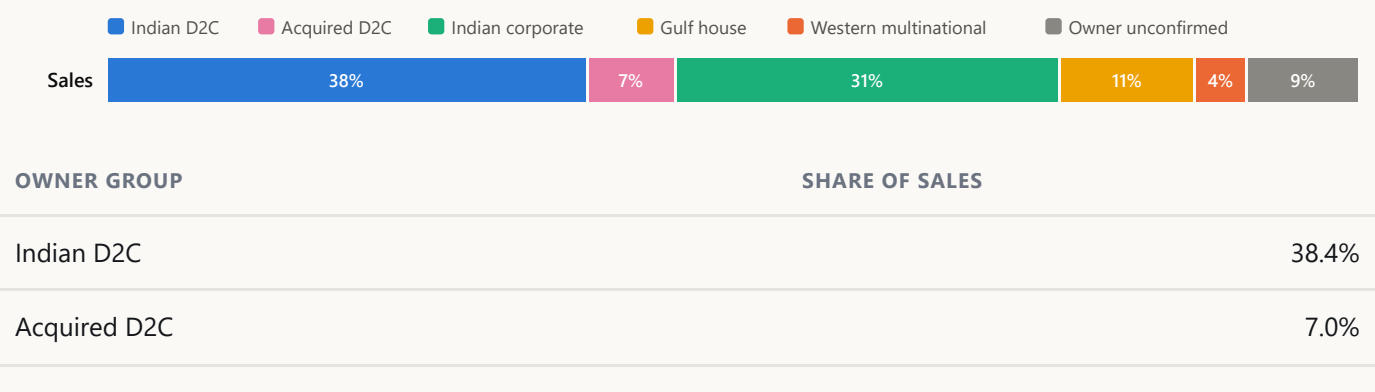
Nobody can smell a perfume online. So we wanted to know who wins when the buyer has only the reviews, the price and the name. We read every product Amazon India shows for six fragrance searches, 755 listings, and opened every one that shows sales.

The measure. Sales on Amazon India: the “bought in past month” figure at its lower bound, times the product-page price, times twelve. Read on 2026-10-12, during Amazon’s festive sale, in the gifting season.

1 · THE SHORT VERSION

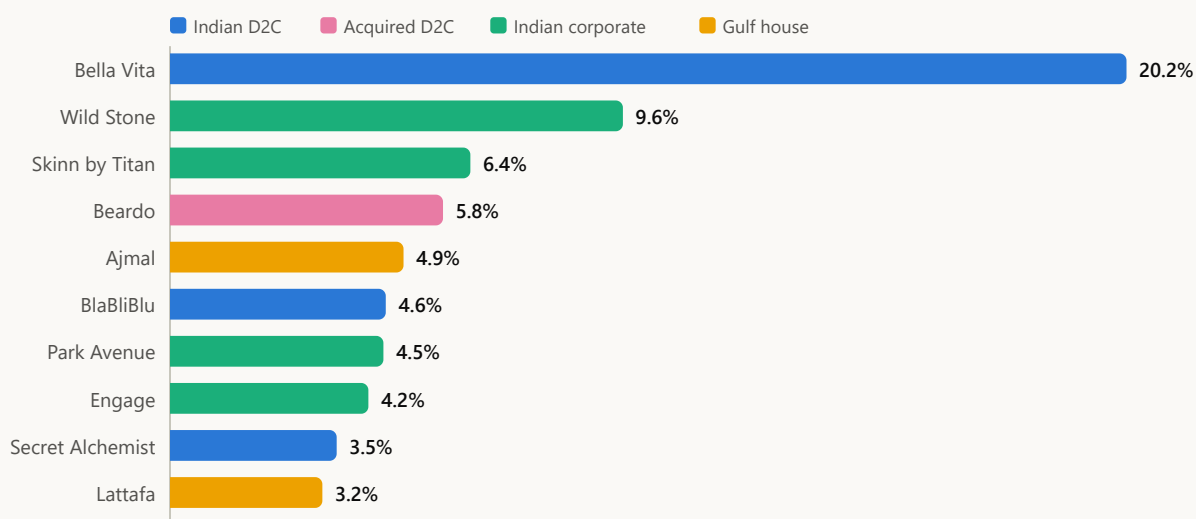
- The fragrance shelf sells at least **₹216.6 crore a year**, about 478,100 bottles and sets a month.
- **Indian D2C brands take 38.4%**, more than any other group. **Bella Vita alone takes 20.2%**, about twice the next brand, Wild Stone (9.6%).
- Indian companies that are not D2C (Wild Stone, Titan’s Skinn, Park Avenue, Engage) take 30.7%.
- **The premium end is Gulf, not Western.** Gulf houses such as Ajmal and Lattafa take 10.8%. Western designer brands take 4.2%.
- The median D2C listing costs ₹399. The median Western one costs ₹1,575.

2 · WHO SELLS IT



Indian corporate	30.7%
Gulf house	10.8%
Western multinational	4.2%
Owner unconfirmed	9.0%

Indian D2C brands take 38.4%, and up to 47.4% with the smaller brands whose owner is not yet confirmed. Two brands that started as D2C now belong to large Indian companies: Beardo to Marico and The Man Company to Emami. They take 7.0%, so D2C-born brands take 45.4% in all.

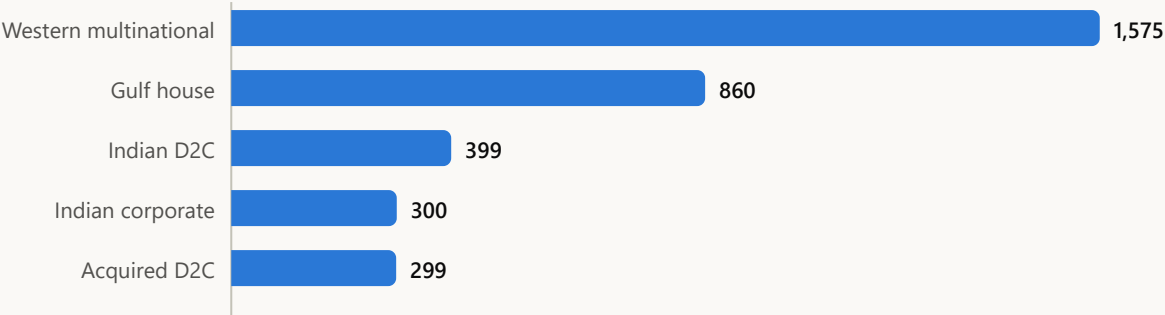


BRAND	OWNER	LISTINGS THAT SELL	MEDIAN PRICE	SHARE	SALES A YEAR, AT LEAST
Bella Vita	Indian D2C	50	₹445	20.2%	₹43.9 crore
Wild Stone	Indian corporate	13	₹319	9.6%	₹20.8 crore
Skinn by Titan	Indian corporate	20	₹1,367	6.4%	₹13.8 crore
Beardo	Acquired D2C	20	₹294	5.8%	₹12.5 crore
Ajmal	Gulf house	15	₹666	4.9%	₹10.7 crore
BlaBliBlu	Indian D2C	17	₹594	4.6%	₹9.9 crore
Park Avenue	Indian corporate	18	₹299	4.5%	₹9.8 crore
Engage	Indian corporate	13	₹246	4.2%	₹9.1 crore
Secret Alchemist	Indian D2C	6	₹1,079	3.5%	₹7.6 crore
Lattafa	Gulf house	6	₹3,000	3.2%	₹7.0 crore

The top three take 36.2%. Bella Vita sells under two store names on Amazon, “Bella Vita Luxury” and “BELLAVITA”. Counted apart, each looks like one of several mid-sized brands. Counted together, it has 50 listings that sell and no close rival.

3 · THE PREMIUM END IS GULF, NOT WESTERN

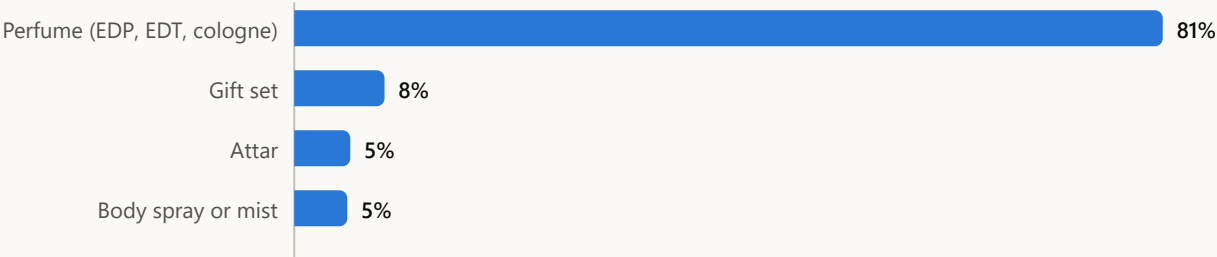
Median listing price, in rupees



OWNER GROUP	MEDIAN LISTING PRICE	LISTINGS PRICED	SHARE OF SALES
Western multinational	₹1,575	31	4.2%
Gulf house	₹860	30	10.8%
Indian D2C	₹399	156	38.4%
Indian corporate	₹300	123	30.7%
Acquired D2C	₹299	29	7.0%

Gulf houses sell 2.6 times what Western designer brands sell, at about half the median price. Ajmal, based in Dubai, is the fifth brand on the shelf. Lattafa sells six listings at a median of ₹3,000. The Western names (Davidoff, Azzaro, Jaguar, Nautica, Calvin Klein) each take under 1%. D2C brands do not win on prestige. Their median listing, ₹399, sits near the Indian corporate brands at ₹300, not near the Western ones. They sell at the price of Wild Stone and Park Avenue.

4 · WHAT SELLS



We take the product type from Amazon’s own category, not from the title. Perfume is 81.3% of the money. Gift sets are 8.4%, attar 5.2% and body sprays and mists 5.0%. When we read the title words instead, gift sets came out more than three times larger, because single bottles are often called a “combo” or a “pack of 2”.

By the words in the title: products for men are 45.6% of the money, unisex or both 24.7%, and for women 20.8%. 9.0% name nobody.

5 · WHAT SHARE OF EACH COMPANY’S SALES THIS IS

Each company’s sales on this shelf, beside what it reports for its whole business.

COMPANY	REPORTED REVENUE	ON THIS SHELF	SHARE OF REVENUE
Bella Vita (FY25)	₹456 crore	₹43.9 crore	9.6%
BlaBliBlu (run rate, Mar 2026)	₹100 crore	₹9.9 crore	9.9%
AdilQadri (CY2024)	₹120 crore	₹4.4 crore	3.7%

This shelf is about 10% of Bella Vita’s filed revenue and about 10% of BlaBliBlu’s run rate. For AdilQadri it is about 4%: it sells most of its volume through its own site and its own stores.

Bella Vita: filed revenue. BlaBliBlu and AdilQadri: company statements.

6 · WHAT WE PREDICTED

We wrote down 7 predictions before we read the shelf. 7 of 7 held.

WE SAID	WE FOUND	
The shelf sells ₹150 to ₹300 crore a year	₹216.6 crore	Right
The largest brand is Indian D2C, most likely Bella Vita	Bella Vita, Indian D2C, 20.2%	Right
Indian D2C brands take 35 to 55%	38.4% (up to 47.4%)	Right
Gulf houses take 10 to 20%, more than Western designer brands	Gulf 10.8%, Western 4.2%	Right
The median D2C listing costs under a third of the median multinational one	₹399 against ₹1,575 (25%)	Right
The top three brands hold under 40%	36.2%	Right
Body sprays and mists carry under 15% of the money	5.0%	Right

7 · METHOD

Amazon India, six searches, three pages each: perfume for men, perfume for women, unisex perfume, body mist, attar, and perfume gift set. We counted only Amazon's own search results, not the carousels of related products. We opened the product page of every listing that shows a sales figure.

The shelf is everything Amazon files under Beauty, then Fragrance. Deodorants, henna, amla and hair packs that the searches also returned (₹13.7 crore a year) sit in other Amazon categories and are not on it.

AMAZON CATEGORY	LISTINGS THAT SELL	SALES A YEAR, AT LEAST	
Eau de Parfum	161	₹83.8 crore	On the shelf
Perfume	133	₹83.8 crore	On the shelf
Sets	41	₹18.3 crore	On the shelf
Attar	88	₹11.4 crore	On the shelf
Body Sprays & Mists	75	₹10.8 crore	On the shelf
Eau de Toilette	18	₹5.8 crore	On the shelf
Eau de Cologne	1	₹1.5 crore	On the shelf
Fragrance (no sub-category)	3	₹1.3 crore	On the shelf
Deodorant	14	₹6.0 crore	Left out
Hennas	3	₹5.6 crore	Left out
Hair Masks & Packs	1	₹0.8 crore	Left out
Amla	1	₹0.8 crore	Left out
Pooja Supplies	1	₹0.2 crore	Left out
Body Paint	1	₹0.2 crore	Left out
Rosemary	1	₹0.2 crore	Left out
Grooming Sets & Kits	1	₹0.1 crore	Left out
No category shown	1	₹0.0 crore	Left out

Sales are Amazon's "bought in past month" figure at its lowest value, times the price on the product page, times twelve. A company that sells under several store names counts as one brand.

Every brand's owner is researched by hand.

We read shelves like this one by category, by platform and by country, and read them again to show what moved. If you are building in fragrance or personal care, **book a discovery call at www.impuls8.com/enterprise.**

impuls8 · read 2026-10-12 · Amazon India · 755 listings, 544 with sales · every figure is generated from the read and checked by a second script.