

Air Care Industry in Indonesia

Executive Summary

A small but steadily accelerating home care category, controlled by two groups. Electric automatic sprays now lead, gel is the everyday workhorse, and car fresheners have stalled.

~IDR 3.6T

2025E VALUE · ≈US\$220M

+8.5%

GROWTH 2025E

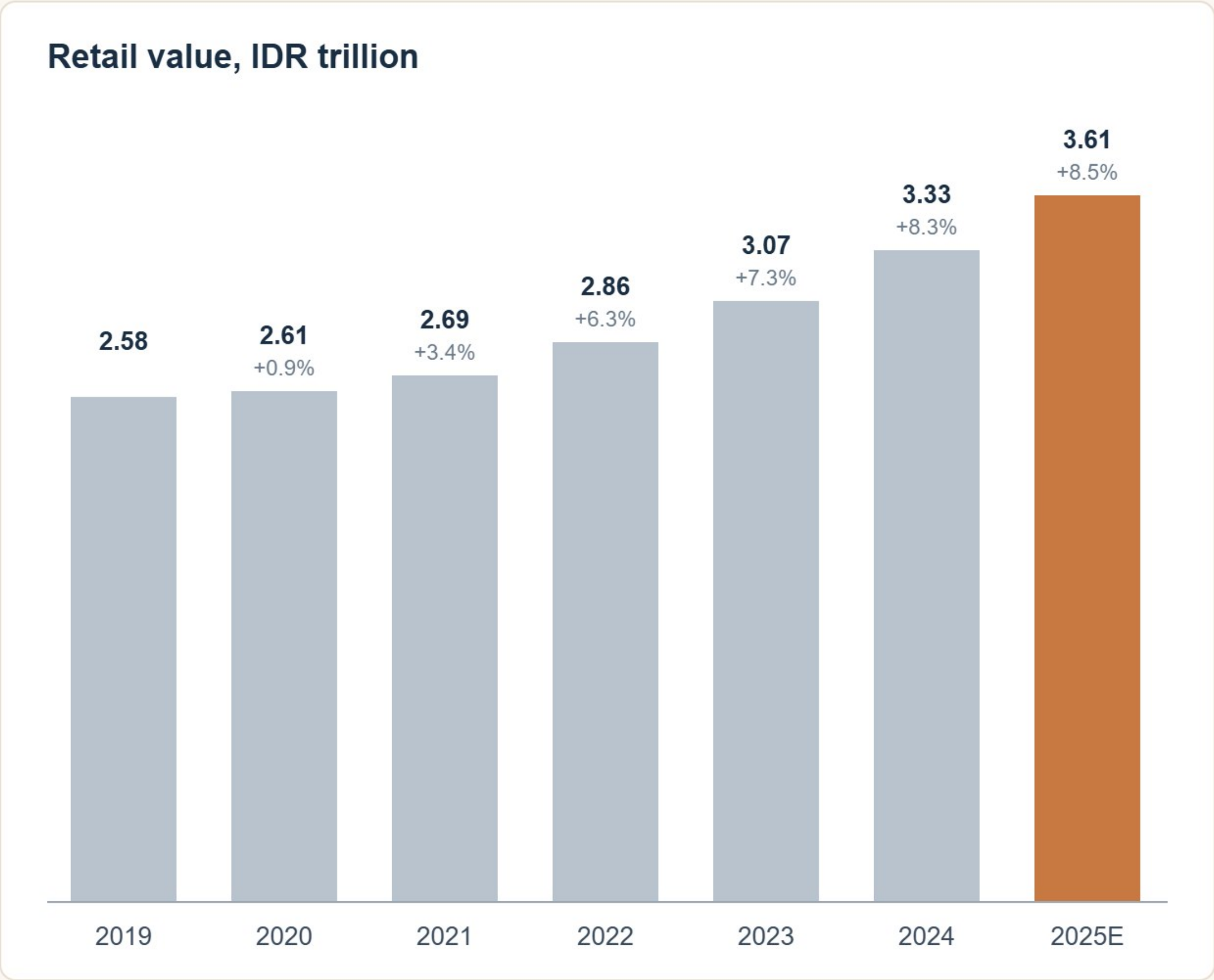
~30%

ELECTRIC SHARE

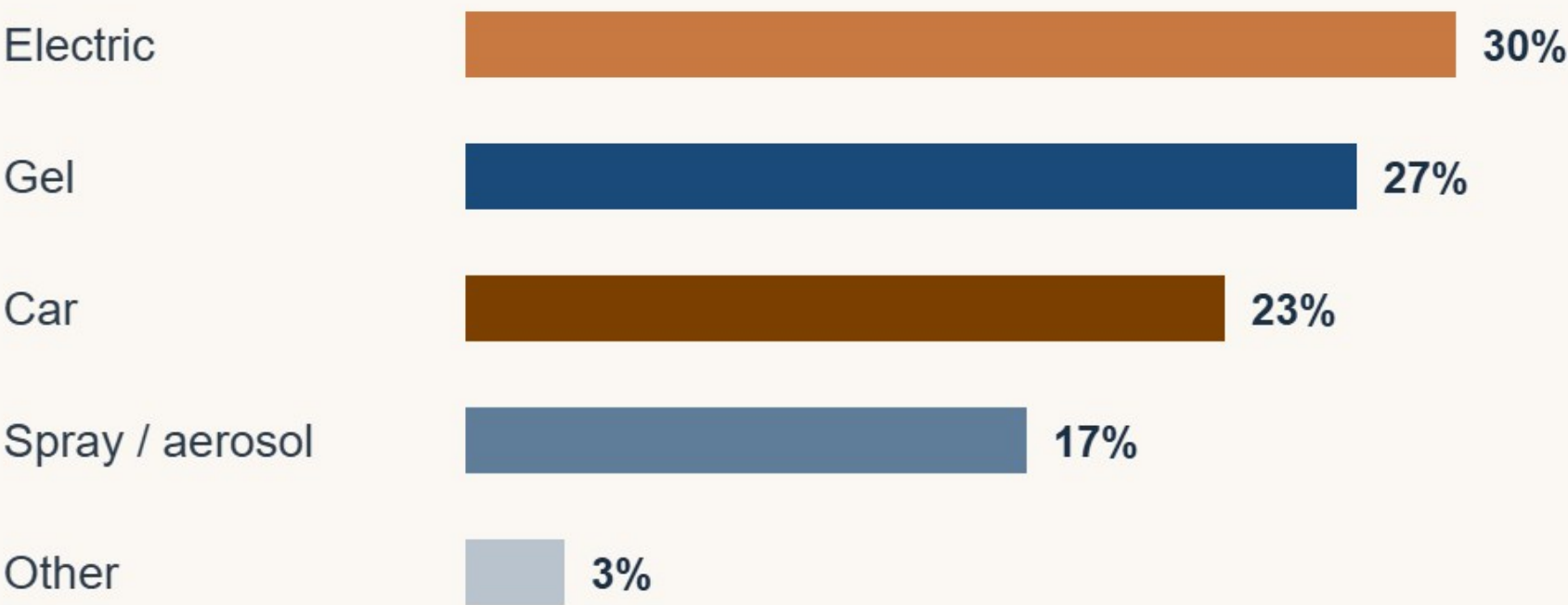
~IDR 48K

PER HOUSEHOLD / YEAR

Growth picked up every year since 2020



Share of retail value by segment, 2025E



- Electric devices delivered ~51% of new sales 2019–24; they passed car fresheners in 2023.
- Car fresheners: ~0.4% a year despite 20.1m passenger cars (~IDR 40k per car per year).
- Real growth ~13% over 2019–24 after inflation; lemon and lavender are the top scents.

A duopoly built on insecticide distribution

~43%

GODREJ (STELLA)
VALUE SHARE 2024

~39%

SC JOHNSON
GLADE + BAYFRESH, 2024

~7%

CAR SPECIALISTS
DOWN FROM ~9% IN 2020

~IDR 3.7T

GODREJ INDONESIA
REVENUE FY25 (+8% CC)

- **Channels:** minimarkets for gel cups; marketplaces for refill multipacks and car fresheners.
- **Moat:** HIT and Baygon sales teams already reach every store with mosquito products.
- **Rules:** PKRT permit from the Ministry of Health (Permenkes 62/2017); aerosols are Class 2.
- **Openings:** premium diffusers, kos and pet odour, professional scenting for hotels and malls.

Cost structure, competition, consumer behaviour, mega trends and 2026–2030 outlook: RisetLokal Premium Report · risetlokal.com/contact