



Melanie Martinez's Cry Baby Perfume Milk is packaged in a vintage baby bottle with a twist-off rubber top. The fragrance is meant to be "nostalgic and sweet" and the packaging echoes the sentiment. Photo courtesy of Atlantic Records.



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Forward Thinking: Fragrances of the Moment

Fine fragrance continues to be a competitive landscape, with a plethora of fragrance applications and choices across all distributions. With a myriad of options, consumers are no longer confined to fine fragrance for a memorable fragrance experience.

The global fragrance and perfume market is expected to reach \$51 billion by 2022,^a according to Global Industry Analysts, Inc. According to NPD Group,^b about 90% of U.S. consumers use scented products such as perfume, candles (up 16% in 2016), diffusers (up 19% in 2016), portable formats such as rollerballs and travel sprays (up 11% and 38%, respectively, in 2016), home ancillaries/gift sets (up 75%) and gender-neutral scents (up 34–54% in 2016). Mass fragrance sales were down in for 2016 while prestige fragrance

^a <http://www.strategy.com/PressMCP-2533.asp>

^b <http://www.gcimagazine.com/marketstrends/segments/fragrance/Beauty-2017-2018-Fragrance--Good-NewsBad-News--412576343.html>

sales^c increased 2% for the year and flankers were responsible for 161% of fragrance gains. The niche fine fragrance segment has added more than \$240 million to the fragrance market since 2014. As mentioned in Trendincite's *Perfumer & Flavorist* "Forward Thinking: By Nature," article, which appeared in April 2017, the natural fragrance market is projected to be worth \$5.3 billion by 2024.^d

Fine fragrance activity is being driven by men's fragrance launches, coffee and dark chocolate inspired gourmand directions, custom scents and innovative packaging. Fragrance focused retailers, environmental scent branding, alternative fragrance applications and technology are offering consumers memorable and interactive scent experiences.

Men are Keeping Fragrances a Float

According to NPD,^e 10% fewer U.S. women age 18–24 and 5% fewer women age 25–34 reported shopping for fragrance in all of 2016. However, according to Mintel,^f 59% of U.S. male 18–34 year-olds use personal care products in order to smell good. Furthermore, American men aged 18–34 represent by far the main fragrance user group, over-indexing in regular use across all fragrance types. Like the women's market, the shelves are filled with many competing products making it difficult and often overwhelming to select a fragrance. Here are a few examples of recent men's fragrances trying to differentiate their brands.

Axe You is the newest scent in the **Axe** range. The fragrance is formulated with coriander leaves, black basil, black pepper, verbena, amber, vetiver and cinnamon. Grooming company **Beard Guyz** rolled out a new collection of three products: **Beard Growth Serum**, **Beard Scentz** and **Beard Butter Growth Formula**. The Beard Scentz is "designed to eliminate smells that build up in facial hair and includes natural and organic ingredients such as tea tree, manuka and thyme oils.

To celebrate the brand's 20th anniversary, **The Art of Shaving** released a new fragrance collection in November 2016. Described as "at once modern, yet nostalgic," the collection consists of five fragrances: **Coriander & Cardamom**, **Green Lavender**, **Oud Suede**, **Sandalwood & Cypress** and **Vetiver Citron**. **ManRose** by **Etro** is classified as an oriental floral fragrance for men that highlights rose. The scent is made with Calabrian bergamot,

Sichuan pepper, cardamom, elemi, Turkish rose, geranium, incense, patchouli, vetiver, musk, leather, amber and precious woods.

Wake Up and Smell the Coffee

Coffee is engrained in our culture and its spilling over into fine fragrance. According to IRI data,^g the iced coffee/cappuccino segment experienced sales increases of 17% year-to-date for \$1.8 billion in the 52 weeks ending May 15, 2016. Americans' affinity for coffee has led to a variety of fragrances inspired by this buzzy ingredient.

Black Opium launched in 2014 and was described as "gourmand floral fragrance with a strong coffee bean accord." **Black Opium Floral Shock** launched in 2016 as a follow up, and features the "iconic coffee and vanilla accord combined with new floral notes of gardenia and orange blossom." In the last quarter of 2016, Indie brand **Kerosene** launched **Follow**, a new gourmand coffee fragrance, while **Providence Perfume Co.** **Heart** introduced **Darkness for Men**. Follow is formulated with notes of dark-roasted coffee, vanilla, amber, benzoin, tonka and sap, while Darkness for Men is a fougère fragrance crafted with oak moss, cedar moss, lavender, vetiver, espresso, nutmeg, tonka, cedar wood and rockrose notes. Under the Gorilla Perfume line, **Lush UK's Kitchen**, the producer of small batch exclusive products, introduced **Cardamom Coffee** with a subtle hint of coffee.

Last summer, **Britney Spears** debuted **Private Show** at Kohl's. It was the singer's 20th fragrance and shares a name with a track on Spears' album

^g <http://www.bevindustry.com/articles/89427-state-of-the-industry-coffee-consumption-remains-steady>



Commodity Tonka is part of the **Platinum Collection** and is described as floral woody with gourmand notes of smoky whiskey, leather, tobacco, dry cocoa, caramel and coffee. Photo courtesy of Commodity.

^c <http://www.drugstorenews.com/article/npd-group-prestige-beauty-grew--01>

^d <http://www.perfumerflavorist.com/fragrance/trends/Natural-Fragrance-Ingredient-Market-Worth-53-Billion-By-2024-405461985.html>

^e <http://www.gcimagazine.com/marketstrends/segments/fragrance/Beauty-2017-2018-Fragrance-Good-NewsBad-News--412576343.html>

^f <http://www.perfumerflavorist.com/fragrance/trends/What-Scent-Trends-are-Millennials-Looking-for-in-2017-413191223.html>

Glory, which launched at the same time. Classified as an oriental musk, the scent was inspired by Britney's love of dulce de leche, white florals and iced coffee and highlights whipped crème coffee, clementine, nectarine, dulce de leche, orange flower, jasmine sambac, amber and musk accords.

In January, **Ralph Lauren** added **Ralph Lauren Polo Red Extreme**, "an addictive, fiery and fresh blend of black coffee essence, vibrant blood orange notes and black ebony wood," to its collection. In February, **Commodity** introduced the **Platinum Collection** of five fine fragrances, with **Commodity Tonka** as one variant. The scent is described as floral woody with gourmand notes of smoky whiskey, leather, tobacco, dry cocoa, caramel and coffee. **Eight & Bob's** new scent **Nuit de Megeve** has heart notes of tonka beans, orris and black coffee.

Sweet on Dark Chocolate

As warmer scents continue to gain momentum, sophisticated gourmand fragrances with a focus on dark chocolate are emerging. Launched in July 2016, **Chocolate Man Cologne** by **Dame Perfumery** is self-described as "simply chocolate, and so delicious," while the fragrance blog, *Now Smell This*, describes it as having "the aroma of tempering or baking chocolate, notes of vanilla bean, woody patchouli and burnt sugar." For the 2016 holiday season, indie perfumer **Dawn Spencer Hurwitz** introduced **Dark Moon**. Self-described as a "chocolate chypre," it is "a



Chocolate Man Cologne by **Dame Perfumery** is self-described as "simply chocolate, and so delicious." Photo courtesy of Dame Perfumery.

rich and sophisticated scent with notes of red wine, dark chocolate and warming holiday spices." By **Kilian Noir Aphrodisiaque** launched for the brand's Paris boutique and is "an overdose of dark chocolate sprinkled with jasmine buds and cinnamon bark."

Stephen Dirkes, perfumer, filmmaker, multimedia artist and founder of Euphorium Brooklyn, designed the **Voluptuary Trio Set** in **Chocolatl, Pétales** and **Suédois**. To celebrate the launch, Sniffapaloza hosted a March 5, 2017, event at MAISON 10 in New York City. Dirkes collaborated with chef Tessa Liebman and photographer Tal Shpantzer to reinterpret and pair the fragrances in an edible and visual format. Chocolatl showcases spicy nuances, dark Mexican chocolate, raw cane sugar, tzapotl fruit, vanilla, honey, balsam and musk.

Thierry Mugler's Angel perfume launched in 1992 and pioneered the acceptance of gourmand scents. A novel introduction is **Angel Mugler x La Maison du Chocolat**. Thierry Mugler and La Maison du Chocolat partnered to craft a luxury chocolate collaboration of 14-chocolates inspired by the Angel fragrance notes. The gift box debuted in April and includes four different types of bon bons, infused with the notes and essence of Angel: **Celestial**, a citrus milk chocolate; **Delicious**, a cotton candy, marshmallow and red fruits-imbued almond-hazelnut praline; **Voluptuous**, a dark chocolate ganache fragrant with patchouli and vanilla; and **Star**, a playful, tangy, fruity Madagascar chocolate.

An interesting development in fragrance is the news that **Hasbro** is seeking a trademark for its "non-visual play-doh scent mark," according to a *Teen Vogue* article.^h The aroma was self-described as "a unique scent formed through the combination of a sweet, slightly musky, vanilla-like fragrance, with slight overtones of cherry, and the natural smell of a salted, wheat-based dough."

Custom Scents for Me

With so much similarity on shelves, consumers often seek custom scents. **Scent Trunk** and **Waft** are two online fragrance companies ready to address this demand. Scent Trunk, specializes in finding consumers' fragrances based on a guided process with an at-home Scent Test kit, which features six core scents: citrus, woods, aromatic, floral, amber and chypre. A customer tests the different scents, shares their preferences including likes and dislikes and then a perfumer creates a custom fragrance. The custom scent is \$11.99 per month for a 30-day supply, and customers can receive the same scent each month or have a new one created. Similarly, Waft is an online fragrance company that specializes

^h <http://www.teenvogue.com/story/play-doh-smell-trademark-filed>



In collaboration with IFF, **Waft** is an e-commerce fragrance company that specializes in the creation of custom fragrances through an interactive WaftLab preference tool. Photo courtesy of Waft.

in creating and selling customizable fragrances in collaboration with International Flavors & Fragrances (IFF). Customers use the interactive WaftLab tool to share their eight preferences including type, time of day for use, activity, mood, personal style, waft, ingredients and favorite scents. Then the customer's preferences are analyzed and an IFF perfumer creates a tailored scent. A 100 ml bottle of a custom Waft fragrance sells for \$99, with an option to purchase a 5 ml sample spray for \$19.

Packaged Deal

Although the fragrance juice is the final factor in a repeat purchase, the packaging is what captures the consumer's attention. With the large landscape of fine fragrance, packaging plays a significant role and there are quite a few unique and memorable recent launches.

Moschino Pink Fresh Couture is a flanker to **Moschino's** Fresh Couture 2015 launch. Using the same iconic Windex¹-like bottle, the fragrance is pink and has fruity floral notes of pink jacinth, pink grapefruit, pomegranate, cassis, lily of the valley, rose, cedar and Ambrox.² **Princess of Hearts** joins **Vera Wang's** Princess range. The signature heart bottle, topped with a crown, displays pink juice with a playful graffiti-like red heart pattern. Similarly, **Nicki Minaj** adds **Trini Girl** to her line up. The bottle features the same iconic Minaj bust, but with long straight black hair and a magenta and gold bustier. The fragrance is a fresh cocktail of juicy fruits, exotic Trinidadian Chaconia blossoms, creamy coconut and white musk. American singer /songwriter **Melanie Martinez** introduced **Cry Baby Perfume Milk**.

¹ Windex is a registered trade name of SC Johnson

² Ambrox is a registered trade name of Firmenich

Named after Martinez's new album, *Cry Baby*, contains burnt caramel and woody notes and is meant to be "nostalgic and sweet." It is packaged in a vintage baby bottle with a twist-off rubber top.

Nominated "Instagrammer of the Year" by the Council of Fashion Designers of America (CFDA), Instagram artist Donald Robertson (@Drawbertson), has partnered with **DKNY** for the packaging of the limited edition flankers **Be Delicious City Collection**, inspired by three New York City neighborhoods. **Brooklyn Girl** is described as "an artsy edgy fragrance" while **Chelsea Girl** is a "quirky classic," and **Nolita Girl** is "modern pop." In April, **Bond No. 9 New York** debuted **Nolita**, which was paired with a lipstick. The fragrance highlights freesia, tangerine, jasmine sambac, lily, amber, musk and sandalwood. The reverse scenario of Bond No. 9 New York Nolita is **MAC Shadescents**. MAC Shadescents is a collection of six fragrances inspired by the brand's "cult-favorite lipsticks:" **Candy Yum-Yum**, **Crème d'Nude**, **Lady Danger**, **My Heroine**, **Ruby Woo** and **Velvet Teddy**.

Inspired by fashion brand **Kenzo's** recognizable and signature eye motif designed by creative directors Carol Lim and Humberto Leon, **Kenzo World** is housed in a glass bottle shaped like the iconic eye. The bottle was designed by Patrick Li and features a black rubber top shaped like the lid of an eye, a pink gold ball stamped with the Kenzo logo for the pupil and opaline for the rest of the eye shape. The eye reveals itself in every angle when seen from the front or from above and the name is printed in Braille on



Inspired by today's chic woman, **Good Girl** by Carolina Herrera highlights notes of jasmine sambac, tuberose, cocoa and tonka bean. The perfume is packaged in a unique smoky midnight blue glass bottle shaped like a stiletto shoe with a thin gold heel. Photo courtesy of Carolina Herrera.

top of the box. **Carolina Herrera** launched *Good Girl* last year outside of the U.S. and it was the brand's 23rd global fragrance. Expected in the U.S. in 2018, Macy's released the fragrance at the beginning of 2017. Inspired by a modern woman and perceiving perfume as an accessory, Good Girl is packaged in a unique smoky midnight blue glass bottle shaped like a stiletto shoe with a thin gold heel. The fragrance highlights jasmine sambac, tuberose, cocoa and tonka bean.

Although not a fine fragrance package, an honorable mention is **Jimmy Choo X Laduree Mini Trunk**. To mark the opening of Laudree's new Beverly Hills boutique, **Jimmy Choo** created a mini signature five-drawer trunk designed to hold 15 red-fruit-flavored macarons. The mini trunk can be reused as a jewelry or cosmetics box.

Fragrant Retailers

Fragrance creates an emotional and personal connection between the user and the product. Online fragrance retailers and perfume brands are trying to engage consumers by opening brick and mortar stores.

For the holidays last year, from October 1 to January 8, 2017, **Fragrance.com**, the online perfume retailer, opened its first pop-up store in the U.S. It was a 1,500 square foot store located in Roosevelt Field Mall in Garden City, New York. **Beautyhabit**, the online apothecary, which closed its boutique six years ago, re-enters the market with a move into M. Fredric's Westlake Village, CA, flagship store. The 200 square-foot in-store shop features roughly 200 stock keeping units from 35 different brands.

At the end of 2016, **Fueguia 1833**, the Argentinian niche fragrance brand, opened its first New York store located in the city's SoHo neighborhood. The store highlights a wide, central table that displays over 60 Fueguia 1833 fragrances, each showcased on walnut wood cubes with glass vials to enable customers to smell each scent. In Paris, **Frédéric Malle** opened his fourth boutique in October 2016. Designed in collaboration with architects Jakob + MacFarlane, the store's flooring, walls and ceiling are mirrored and feature a beehive design with plywood bookshelves that showcase Malle's fragrances.

In February, **Acqua di Parma** debuted its first North American shop and fourth global location in Miami's Brickell City Centre. Part boutique and part barbershop, the 1,000 square foot shop carries the full Acqua di Parma fragrance line, skincare, home and travel accessories. The barbershop offers four different men's services, including a facial that uses Acqua di Parma Collezione Barbiere products. Estée Lauder is expanding Le Labo's presence. In March,

Le Labo opened its fifth Southern California store inside The Grove shopping center in Los Angeles.

Environmental Scent Branding

Trendincite's "Forward Thinking: Fragrance Frenzy" article, which appeared in the June 2016 issue of *Perfumer & Flavorist* magazine, explored fine fragrance activity and touched on environmental air care. Although not a fine fragrance, scented air is still an important aspect of the industry.

Museums, jewelry, scented temporary tattoos and notebooks are a few recent examples of alternative applications for interactive fragrance experiences.

Known for their controversial heavily, masculine scented stores, **Abercrombie & Fitch** is introducing a new store concept. Abercrombie & Fitch will still infuse scent, but the new fragrance is described as "lighter, cleaner, and gender-neutral." In April, the brand added *First Instinct for Her*, a counterpart to First Instinct, which launched in 2016. The fragrance is classified as floral with magnolia, grapefruit zest, passion fruit, orange blossom, butterfly orchid, tonka bean and amber. In September last year, for the first time, **Old Navy** launched a five SKU line including perfume, hand cream, hair-and-body mist, body scrub and body lotion. They are available in the three different scents: *Orange Blossom & Tea*, *Sea Salt & Fig* and *Sweet Cream & Honey*. **New Balance** opened its first experience store in Beijing with a retro 1950s and 60s feel, reminiscent of its shoe stores from the mid-20th century. To complement the style, an environmental scent of natural woody notes, with a touch of leather was created. A new branch of **Lloyds Bank** opened in South London and to attract customers; it pumps a white tea and thyme scent into the air.

Hotel Costes is opening an offshoot of its famed Parisian hotel in London on the corner of Sloane Square, expected in summer 2017. Like the original, "it promises to be a heavily brocaded assault on the senses that will incorporate carefully curated music, perfume and flowers." It will feature Hotel Costes'

Parfum boutique and offer its signature luxury-scented and famous **Brown** candle with waxed wood, rum, mahogany, bitter orange peel, paprika and oak moss accords. Luxury rental building **21 West End** on the Upper West Side in New York City opened in September 2016 and uses environmental fragrances to scent the lobby. The building rotates four seasonal fragrances: **Ocean Mist**, **Season's Greetings**, **White Blossom Tea** and **Cranberry Apple**. **ScentAir**, the U.S. scent marketing company, which creates environmental scents for retailers, casinos and hotels, has acquired UK-based competitor Brandaroma to further expand their global reach and accelerate growth.

A Fragrance Affair

Fragrances are associated with memories and consumers look for new ways to experience it. Museums, jewelry, scented temporary tattoos and notebooks are a few recent examples of alternative applications for interactive fragrance experiences.

In December 2016, the **Grand Musée du Parfum** in Paris opened. To educate the public on the history of perfume, the museum created high-tech sensory exhibits, which showcased 60 scents and gave attendees an opportunity to create their own perfumed business card. From June 21–September 17, 2017, the Somerset House in London will show “**Perfume: A Sensory Journey Through Contemporary Scent**” exhibit. Somerset House describes the exhibit as a “multi-sensory exhibition featuring 10 extraordinary perfumes and their pioneering creators, who have radically changed our perceptions of fragrance over the last 20 years.”

Last year, **Tattly**, the temporary tattoo brand introduced a collection of scented tattoos in the **Perennial Set by Vincent Jeannerot**. In collaboration with **Agilex Fragrances**, **Blue Hydrangea**, **Pink Peony**, **Purple Peony** and **Rose La France** tattoos include notes of dewy fuchsia petals, pink poppies, ylang ylang and poplar wood. This year, Tattly introduced the **Arm Candy Set by Julia Rothman**, which contains **Be Mine 4ever**, **Candy Bling**, **Candy Charms** and **Sweetheart Strand** tattoos. Agilex Fragrances scented the tattoos, which highlight notes of vanilla frosting, candy corn and cotton candy.

Sophie Buhai, the Los Angeles-based jewelry designer, crafted a group of sculptural necklaces that double as fragrance vessels. Offered in a **Perfume Collar** and **Perfume Pendant**, both are inspired by Victorian charms used for smelling salts and perfumes. Unilever's **Lux** brand partnered with Italian papermaker **Moleskine** to create a limited-edition **Lux Fragrance Notes** notebook. In conjunction with Firmenich, the notebook highlights watercolor artwork and quotes from Lux master perfumers including Loc Dong, Nicole Mancini, Gil Clavien, Sabine de Tscharnier and Annie Buzantian. The notebook is only available in China, Hong Kong and Saudi Arabia and “provides an introduction to the art of perfume creation as well as a guide to fragrance evaluation and a page for consumers to record their fragrance notes.”

Fragrance Innovation & Technology

Like all markets, fine fragrance looks to technology to drive new innovations. The following are some examples of the latest innovations to hit the market.

According to The NPD Group, Inc., 83% of women say that “long-lasting” is the top attribute they are looking for in a fragrance.^k Abby Wallach and Caroline Fabrigas, the founders of **ScentInvent Technologies**, “a scent innovation company to re-think routine in the development and delivery of fragrance forms and functions,” met this need with **LINGER¹ Lasting Fragrance Primer**, their first fragrance innovation to market. Applied to clean skin before perfume, LINGER Lasting Fragrance Primer helps a fragrance last three to five times longer. According to the company, the primer “creates an invisible shield that preserves skin's moisture as it balances its surface for scent that lasts and memories that linger.” **FragranceLock** similarly serves the same purpose; the product is meant to give fragrance longer lasting staying power. However, FragranceLock is a finishing spray applied on skin



Tattly's Arm Candy Set by Julia Rothman contains **Be Mine 4ever**, **Candy Bling**, **Candy Charms** and **Sweetheart Strand** scented tattoos. In collaboration with Agilex Fragrances, the tattoos highlight notes of vanilla frosting, candy corn and cotton candy.” Photo courtesy of Tattly.

^k <https://www.npd.com/wps/portal/npd/us/blog/2016/ready-for-prime-time/>

¹ LINGER is a trademark of ScentInvent Technologies



LINGER Lasting Fragrance Primer by ScentInvent Technologies uses a patent pending hydrophobic formulation that is clinically proven to extend fragrance wear. Photo courtesy of ScentInvent Technologies.

after perfume, which creates “a breathable mesh on the skin to decelerate a fragrance’s natural evaporation cycle, making fragrance last longer.” It is said to help make perfume last for up to 12 hours or longer.

Although, not a technology per se, *Threat de Toilette Pour Femme* and *Pour Homme* were created by security company **Kaspersky Lab** and beauty blogger Scarlett London to make the younger generation aware of the dangers of oversharing online. London states, “I don’t feel that we discuss cyber-security enough— or that enough attention is given to it, especially considering how much of our time and life is spent online.” According to a March 9, 2017, *The Sun* article,^m other smells to highlight the varying online dangers include *Ransom*, with the tagline “reassuringly expensive;” *Mal-wear*, billed as “the wicked way to pierce the heart;” *Social Enginair*, which can “lure them in;” and *Phish*, which promises to “catch your deepest love.”

In Japan, *sume-hara* means “smell harassment,” and according to a 2016 article in *The National World*,ⁿ large firms in Japan offered smell-care seminars to inform men what causes unpleasant body smells and how to avoid them. Japanese copier maker **Konica Minolta Inc.** has developed *KunKun*, which translates to “sniff, sniff,” a hand-held device and app that detects body odors. The device picks up chemicals that cause three different kinds of odors: a sweaty-locker room, a greasy smell and rancid cooking oil.

^m <https://www.thesun.co.uk/news/3051698/beauty-blogger-scarlett-london-launches-threat-de-toilette-in-bid-to-stop-youngsters-oversharing-online/>

ⁿ <http://www.thenational.ae/world/east-asia/japanese-firms-raise-a-stink-about-smell-harassment>

Conclusion

From marketing to packaging to the olfactive directions, distinguishing fine fragrance brands from each other and finding a signature scent is challenging. Consumers have more fragrance choices than ever and the landscape is crowded and competitive. Expect to see more fine fragrances across all distributions with a focus on millennial men, e-commerce custom scents and gourmand fragrances inspired by flavors and food ingredients, including coffee and dark chocolate.

Iconic and memorable packaging that resonates with the consumer will continue as brands vie for customers. More brands will open flagship stores to highlight their fragrances and offer consumers personal experiences while museums will launch exhibits to showcase the history of fragrance and engage the public in interactive displays. Scent branding is no longer reserved for hotels, casinos and retailers—now luxury buildings are part of the mix. Consumers, particularly the younger generation look for unique and alternative fragrance applications. Watch for new fashion collaborations and scented products such as jewelry and temporary tattoos to meet this need. Consumer demands for longer-lasting fragrances and technology has led the way to new developments that extend fragrance wear, while apps are being created to detect body odor.

Additionally, it appears that you are never too young to wear fragrance. *TMZ* reported that Beyoncé’s company is planning to launch a line of Blue Ivy Carter products after her five-year-old daughter’s namesake. It is unofficial, but the line could potentially consist of fragrances, hair care and cosmetics aimed at the children’s market. Although the market is saturated, there is always room for another fine fragrance category to create new opportunities for brands, manufacturers and fragrance houses.

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