



*Like many categories, fine fragrance was impacted by COVID-19.*



■ BY AMY MARKS-MCGEE,  
Trendincite LLC; amy@trendincite.com

## Forward Thinking: Fine Fragrance Trends Driving the Industry

Highlighting four current trends guiding fine fragrance innovation.

Universally, consumers have felt the weight of the pandemic in terms of rewiring daily routines to shopping for necessary and luxury items. Store closures coupled with limited travel and working from home have made consumers reevaluate their needs and how they shop. Like many categories, fine fragrance was impacted by COVID-19. According to the NPD Group<sup>a</sup>, 49% of fragrance wearers reported a reduction in their fragrance usage due to COVID-19. However, per NPD, “higher concentration fragrances, including eau de parfums, with the advantage of a longer lasting scent, have been trending in 2020.” NPD<sup>b</sup> also reported that the 2020 U.S. prestige beauty sales totaled \$16.1 billion and the prestige fragrance category dropped by 8%.

<sup>a</sup>[www.npd.com/wps/portal/npd/us/news/infographics/2020/a-2020-view-of-the-fragrance-consumer](http://www.npd.com/wps/portal/npd/us/news/infographics/2020/a-2020-view-of-the-fragrance-consumer)

<sup>b</sup>[www.perfumerflavorist.com/fragrance/trends/Holiday-Fragrance-in-the-Face-of-COVID-19-NPD-573030101.html](http://www.perfumerflavorist.com/fragrance/trends/Holiday-Fragrance-in-the-Face-of-COVID-19-NPD-573030101.html)

## Pandemic Pivot

Fine fragrance sales are traditionally driven by scent strips, testers and in-person store experiences. However, the pandemic forced consumers to shop online for fragrance, an unconventional behavior. The NPD Group<sup>c</sup> reported U.S. prestige beauty e-commerce sales jumped 46% in 2020. Additionally, consumers turned to social media to engage in fragrance discussions. Research from the Fragrance Foundation UK and ad agency M&C Saatchi<sup>d</sup> outlined an 11% increase in conversations about personal fragrance on social media since the lockdown began. Searches for “spicy fragrance” increased 35%, “earthy fragrance” grew by 34% and “floral fragrance” rose 25%, year-over-year in 2020, according to Pinterest<sup>e</sup>.

The silver lining is that consumers have learned to shop for fragrances digitally and engage in fragrance conversations through social media. In addition to traditional practices, brands and manufacturers can now use e-commerce to promote and sell fine fragrance without the in-person experience barrier.

A novel illustration is direct-to-consumer fragrance subscription service Snif, which launched in October 2020. Snif was designed to “take all the complexity from the fragrance-buying process away.” The brand launched its first genderless bundle kit with three scents: Ex On The Beach, Salty Stares and Way With Woods and customers are sent three full-sized bottles, plus three testers. The company allows consumers to test the three fragrance at home, and only pay for the scents they wish to keep.

As fine fragrances rebound, four current trends are on the radar. Layered fragrances, sustainable

materials, rose interpretations and video game inspiration drive fine fragrance innovation.

## Layered Fragrances

Layering fragrances is not new; it comes in and out of fashion. Currently, layering fragrances is in and brands are launching scent collections with personalization in mind.

In the summer of 2020, Avon introduced Sparkling Neroli, the first scent in the LYRD series. LYRD is self-described as, “A world of authentic fragrances crafted by master perfumers with multifaceted ingredients that come together, inspired by the beauty found in everyday life.”

Avon followed with Artisan Cherry Vetiver and Artisan Santal Musk as part of the LYRD Artisan collection, which is described as, “Captivating gender-neutral scents with unexpected combinations of the finest ingredients that are exquisite alone, but even more fascinating together.”

While layering is key, the Bvlgari Allegra collection was created to allow consumers to personalize their own “Italian sensorial experience.” The collection features five eau de parfums (EDP) and five magnifying essences. The five fragrances are Dolce Estasi (powdery floral), Fantasia Veneta (chypre fruity), Fiori d’Amore (floral), Riva Solare (citrus floral) and Rock’n’Rome (floral, with Eastern influences), while the five magnifying essences are bergamot, musk, patchouli, rose, and vanilla. The company has designed a test on its website, with questions designed to create your own signature scent combination.

## Sustainable Fragrances

“Forward Thinking: Fragrances March On,” which appeared in the May 2020 edition of *Perfumer & Flavorist*<sup>f</sup>, examined the fine fragrance market

<sup>c</sup>[www.perfumerflavorist.com/fragrance/application/multiuse/NPD-US-prestige-beauty-2020-573731411.html](http://www.perfumerflavorist.com/fragrance/application/multiuse/NPD-US-prestige-beauty-2020-573731411.html)

<sup>d</sup><https://bit.ly/2NQYsv8>

<sup>e</sup>[www.glossy.co/beauty/how-fragrance-brands-are-digitally-adapting-to-a-pandemic-holiday-season](http://www.glossy.co/beauty/how-fragrance-brands-are-digitally-adapting-to-a-pandemic-holiday-season)

<sup>f</sup>Page 35; [perfumerflavorist.texterity.com/perfumerflavorist/may\\_2020/](http://perfumerflavorist.texterity.com/perfumerflavorist/may_2020/)



Avon's LYRD and LYRD Artisan collection are “layers redefined,” and are meant to be worn alone or together. Fragrances include Artisan Cherry Vetiver, Artisan Santal Musk, Bouquet De Freesia, Sparkling Neroli and Rose du Soleil; courtesy of Avon.

and discussed sustainable fragrances. Consumers' interest in sustainable fragrances including, raw materials and packaging, continues and brands are launching new products to address their needs.

An example of which is the evolution of Jo Loves by Jo Malone CBE's Fragrance Paintbrush®. Initially launched in 2017, the gel fragrance applicator allowed individuals to apply the scent in a novel way. Wanting to integrate more sustainable packaging, the company rereleased the product in January 2021 with a few modifications. The outer casing of the package was redesigned to a slimmer silver design that uses less packaging as well as offering a refill-able applicator for all seven scents.

In March, Rochas introduced Girl Rochas, designed with the eco-conscious consumer in mind. The juice features neroli, black currant bud, pink pepper, orange blossom, jasmine, orchid, sandalwood, cedar and vanilla and "90% of the ingredients are of natural origin." The packaging is made with a 40% post-consumer recycled (PCR) glass bottle topped with a cap made from recycled plastic.

Hermès H24 is the company's first men's fragrance launch in 15 years with modern innovations. It is described as "a refillable object with an aerodynamic shape" and has a 100% recycled and recyclable paper case. The fragrance is inspired by Hermès menswear creative director Véronique Nichanian's ready-to-wear collections. The scent combines sage, narcissus, rosewood and sclarene.

<sup>g</sup>Fragrance Paintbrush is a registered trademark of Jo Malone CBE



Jo Loves next generation Fragrance Paintbrush features a redesigned slimmer silver outer casing that uses less packaging and the applicator is refillable in seven scents; courtesy of Jo Malone CBE.



Dolce & Gabbana's Dolce Rose scent is formulated with rose absolute and rose centifolia and celebrates the iconic flower; courtesy of Dolce & Gabbana. Other fragrances of note include limited edition Nina Rose Garden by Nina, Cartier's three rose-centered scents, Lancôme's Rose Peonia, and Rose Griotte by Les Parfums de Rosine described as, "balancing cherry blossom's delicate smell, with an acidulous cherry fruit taste and a rose fragrance."

## Rose and its Staying Power

"Forward Thinking: A Note on Fragrance, A Feminine Point of View," which appeared in the January 2012 edition of *Perfumer & Flavorist*<sup>h</sup>, explored fine fragrance trends and identified rose as a dominant theme. A decade later, the iconic rose continues to boast staying power with a variety of rose interpretations continuing to appear in launches.

One of which was developed in late 2020 as a collaboration between Spanish fashion brand Zara alongside Jo Loves. The duo added five fragrances to the Zara Emotions collection including Rose Marshmallow Candy described as smelling like, "bouncing on a trampoline of roses and happiness." This was followed by Dolce & Gabbana's Dolce Rose Eau de Toilette to "celebrate the most iconic of flowers—a symbol of love, beauty, and femininity and one of Dolce & Gabbana's iconic patterns." The fragrance is formulated with rose absolute and rose *centifolia* as well as red currants, mandarin, apple, peach, magnolia, sandalwood, white woods and musk.

## Video Games Act as A Fragrance Muse

Inspiration from video games is one example indicative of the times that is influencing fine fragrance launches. According to The NPD Group<sup>i</sup>, spending on video games reached \$56.9 billion in 2020, a 27% increase compared to 2019. Nielsen

<sup>h</sup>Page 22, [perfumerflavorist.texterity.com/perfumerflavorist/201201](http://perfumerflavorist.texterity.com/perfumerflavorist/201201)

<sup>i</sup>[www.theverge.com/2021/1/15/22233003/us-npd-group-video-game-spending-2020-record-nintendo-switch-call-of-duty-animal-crossing-ps5-ps4](http://www.theverge.com/2021/1/15/22233003/us-npd-group-video-game-spending-2020-record-nintendo-switch-call-of-duty-animal-crossing-ps5-ps4)

insights<sup>j</sup> outlines how companies are using social media, virtual worlds and video games as multidimensional digital advertising platforms to maintain current consumers and capture new consumers. In addition to launching new products and engaging consumers, brands are being inspired by video games and their characters.

In 2003, Air Val International launched a Pokémon perfume. However, the popularity of Pokémon Go in 2016 saw a renewed interest. The scent quickly sold out across multiple online retailers, and generated so much interest that publications, including Bustle<sup>k</sup>, posted articles informing readers of where the fragrance was still available.

<sup>j</sup>[www.nielsen.com/us/en/insights/article/2020/fortnite-is-the-new-irl-why-brands-must-plan-for-a-rise-in-virtual-gatherings](http://www.nielsen.com/us/en/insights/article/2020/fortnite-is-the-new-irl-why-brands-must-plan-for-a-rise-in-virtual-gatherings)

<sup>k</sup>[www.bustle.com/articles/174484-where-to-buy-the-pokemon-perfume-before-its-sold-out-the-world-over-photos](http://www.bustle.com/articles/174484-where-to-buy-the-pokemon-perfume-before-its-sold-out-the-world-over-photos)



Inspired by Mario, the Eau De Plumber is packaged in a blue glass bottle with a gold mustache cap and red hat; courtesy of Game UK.

According to the official Twitter account of Kirby: Right Back at the Stars, Kirby will get its own perfume. In Japan, Kirby Mystic Perfume teased the release with artwork that showed illustrations of perfume bottles of villains that Kirby has encountered, including Marx (1996), Zero (1998), Magolor (2011), Queen Sectonia (2014), Star Dream (2016) and Void Termina (2018).

In late 2020 Game UK launched limited-edition Eau De Plumber and First Person Scent (FPS) unisex scents inspired by video games. The Eau De Plumber pays homage to iconic plumber, Mario, packaged in a blue glass bottle with a gold mustache cap and red hat. The scent is very on brand containing notes of toadstool, peach, daisy and grass lands. FPS is a play on “first-person shooter” games. It is described as “best appreciated from thirty feet away” and “slightly gunpowdery” and features notes of napalm, watermelon and cigars. The pink glass bottle is shaped like a grenade.

### Take Away

According to the NPD Group<sup>l</sup>, although the U.S. prestige fragrance business was down (-8%) in 2020, the market experienced a second half rebound. While the brick-and-mortar channel remained challenged throughout the year, the market saw an accelerated online growth. With COVID-19 vaccines underway and the reopening of department stores and boutiques, the hope is that fine fragrance sales will regain market share as consumers’ behaviors return to normal. Expect to see additional layered fragrance releases, new sustainable fragrances, including raw materials and packaging, as well as more rose interpretations.

<sup>l</sup>[www.npd.com/vps/portal/npd/us/news/press-releases/2021/us-prestige-beauty-sees-pockets-of-growth-amidst-the-industrys-19-percent-sales-decline-in-2020-reports-npd/](http://www.npd.com/vps/portal/npd/us/news/press-releases/2021/us-prestige-beauty-sees-pockets-of-growth-amidst-the-industrys-19-percent-sales-decline-in-2020-reports-npd/)



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