



Recent reporting predicts the global perfume market will reach \$43.2 billion in 2028, growing at a 5.0% CAGR.



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Forward Thinking: Three Fine Fragrance Trends on the Radar

Mood-boosting aromas, better-for-you and better-for-the planet fragrances and celebrity scents drive 2022 fine fragrance trends.

Despite the pandemic, fine fragrance sales have been growing. According to the NPD Group^a, fragrance sales in 2021 were up 49%, year-over-year, boosted by “pandemic winners” such as perfumes and scented candles. Sales of perfumes, colognes and other fragrance “juices” rose by 61%, year over year. The final quarter of 2021 accounted for 45% of fragrance category sales revenue, growing by 35% during the holiday selling season. Fortune Business Insights^b predicts the global perfume market will reach \$43.2 billion in 2028, growing at a 5.0% CAGR. Mood-boosting aromas, better-for-you and better-for-the planet fragrances and celebrity scents drive 2022 fine fragrance trends.

^awww.npd.com/news/press-releases/2022/u-s-prestige-beauty-industry-revenues-grow-by-30-in-2021-and-surpass-2019-levels-says-npd/

^bwww.fortunebusinessinsights.com/perfume-market-102273

Wellness & Mood-Boosting Fragrances

An NPD Fragrance Consumer Study^c found that three out of four consumers feel that fragrance helps lift their moods and evoke happy memories.

Fragrance brands recognize the positive link between scent and mood and are launching mood-boosting fine fragrances. The Nue Co is just such a player in mood-enhancing fragrances. In 2018, the brand debuted Functional Fragrance, which was designed to lower cortisol levels.

Forest Lungs followed in 2020 and was inspired by forest bathing and features “phytoncides, the chemical emitted from trees that helps stress reduction, anxiety reduction and boost the parasympathetic (rest) nervous system.” Nue Co’s latest launch is Mind Energy, which is “peppery and fresh with a warm, velvety base that invigorates mental energy and boosts focus.” Clarins debuted Eau Extraordinaire Treatment Fragrance, “a mood-boosting treatment fragrance that hydrates, invigorates and perfumes the skin with aromatic essential oils.” The fragrance formula is comprised



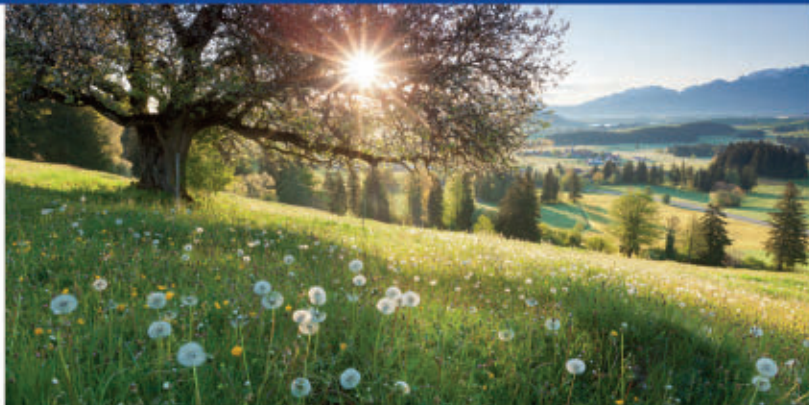
Clarins' Eau Extraordinaire Treatment Fragrance is “a mood-boosting treatment fragrance that hydrates, invigorates and perfumes the skin with aromatic essential oils.” PHOTO CREDIT C/O Clarins

^cwww.npd.com/news/blog/2021/the-fragrance-appeal/

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of 95% ingredients of natural origin such as jasmine, patchouli and red ginger extracts.

Estée Lauder introduced the Luxury Fragrance collection in eight new scents that boast mood-boosting properties using an exclusive ScentCapture Fragrance Extender technology, which lasts up to 12 hours after a single application. The line is marketed as leaving consumers' "mind and senses thrillingly alive, awakened and transformed." Blushing Sands evokes emotions of relaxation and sensuousness; Desert Eden focuses on confidence and energy; Dream Dusk boosts cheerfulness; Infinite Sky invokes confidence and sensuality; Paradise Moon invites happiness and confidence; Radiant Mirage lifts positivity and optimism; Sensuous Stars promotes calm and happiness and Tender Light evokes positivity and joy.

Wanderlust by Brown Girl Jane is the brand's first foray into fragrances. The Wanderlust collection is offered in three mood-boosting scents: Bahia to elicit feelings of relaxation, comfort and calm; Casablanca to promote feelings of sensuality, confidence and romance; and Lamu to energize, revitalize and stimulate. Moodeaux, a female, BIPOC-owned brand, offers Worthy, its signature scent that has "lingering accords with mood-boosting properties and

unique ingredients that help moisturize, as well as lock scent to skin, without alcohol, water or dyes." The SuperCharged SkinScent formula uses plant oils instead of water and the tertiary packaging is made with FSC-certified, recyclable, plant-based and compostable materials. The Ascention fragrance line by Greta Fitz "combines the power of scent with the power of intent." The wellness fragrances are available in five aromas: Ascent to Courage, Ascent to Detox, Ascent to Love, Ascent to Peace and Ascent to Prosperity. The fragrances are designed to be a ritualistic experience and each scent comes with a disassembled bottle, crystal, ritual, mantra card and breathing exercise. Consumers are encouraged to follow a four-step ritual and are given a guided video to help set their intentions. Social media influencer, Addison Rae, has dropped the AF collection in Chill AF (A Daily Dose of Calm), Hyped AF (A Daily Dose of Energy) and Happy AF (A Daily Dose of Euphoria). The "mood-enhancing, skin hydrating and water-based scents" are housed in heat-activated bottles that change color. Although not marketed as a mood-enhancing scent, Phlur's new Missing Person fragrance is described as "a fragrance that is warm, sensual and cozy. It's evocative, but strangely

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familiar. It will warm your skin and heal your soul.” It features white musk, jasmine and orange blossom. The scent resonates with customers and has sold out with a current waitlist.

The investment in fragrance technology designed for wellness that fragrance suppliers and beauty companies are financing is a telltale sign of the significance of mood-enhancing fragrances. For example, IFF has a Science of Wellness program to create scents to aid in relaxation or boost energy. Givaudan offers DreamScenz and VivaScenz technologies, which were developed in the company’s Health and Well-being Centre of Excellence. L’Oreal has partnered with neurotechnology firm Emotiv, to launch a neurotech scent selection platform. In store, consumers will wear an electroencephalogram-based (EEG) headset that will detect neuro responses to the brand’s fragrances and then analyze consumer feedback and make personalized fragrance recommendations. According to L’Oreal, the analysis “accurately senses and monitors behavior, preferences and stress to create a consumer’s ideal scent suited to their emotions.” The system will be introduced worldwide at Yves Saint Laurent’s flagship stores in multiple countries in 2022 and 2023.

Better-For-You and Better-For-The Planet Fragrances

“Forward Thinking: Fine Fragrance Trends Driving the Industry,” which appeared in the May 2021 *Perfumer & Flavorist*^d edition, and “Forward Thinking: Fragrances March On,” which appeared in the May 2020 edition of the magazine^e, examined fine fragrances and discussed sustainable scents. Fragrances that are better-for-you and better-for-the-planet continue to launch. Vegan formulas, upcycled ingredients and carbon captured ethanol are the latest in fine fragrance sustainability activity.

Vegan Formulas

Vegan, plant-based food and beverages are a hotbed of innovation and vegan beauty has begun to follow suit. Consumers’ awareness has been heightened, and fragrance brands are creating vegan formulas to capture their attention. According to a report by Markets and Markets^f, the natural

^dwww.perfumerflavorist.texterity.com/perfumerflavorist/may_2021/

^ewww.perfumerflavorist.texterity.com/perfumerflavorist/may_2020/

^fwww.marketsandmarkets.com/Market-Reports/natural-fragrance-market-254324409.html

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fragrance market was worth \$2.7 billion in 2019, growing by a CAGR of 9.6%. Behind skin care, fragrance is the second most requested clean category. In addition, Globe Newswire's^g research found that the global vegan beauty products market was valued at \$14.3 billion in 2019, growing at a CAGR of 5.9% and estimated to be reach \$25.3 billion by 2029.

In 2021, Chloé launched Chloé Eau de Parfum Naturelle, a vegan fragrance based on organic roses. The fragrance is 100% natural in origin and contains ethical ingredients and naturally derived alcohol. This year, Chloé introduced Nomade Naturelle Eau de Parfum, also a 100% natural origin and vegan formula made with jasmine from Egypt. Coty introduced Good Kind Pure, a clean, vegan and cruelty-free fragrance brand in three scents, Iris Petals, Vanilla Ginger and Wild Peony. The fragrances are formulated without phthalates or dyes and the packaging is FSC certified.

Upcycled Ingredients

Fragrance brands are also beginning to use upcycled ingredients in their formulas. Elizabeth Arden's newest scent, Green Tea Lychee Lime, is created with natural and upcycled ingredients with notes of Mexican lime, lychee, Egyptian geranium, magnolia and green tea. As a flanker to Avon's 1994's Far Away for Women, Avon has launched Far Away Beyond, an upcycled vanilla fragrance. The upcycled vanilla extract was double distilled from 100% upcycled vanilla beans, which would otherwise be discarded. Carolina Herrera Very Good Girl Glam Parfum features upcycled rose water and sustainably sourced vetiver blended with cherry and vanilla bourbon accords.

^gwww.globenewswire.com/news-release/2020/07/09/2060099/0/en/Global-Vegan-Beauty-Products-Market-is-estimated-to-be-US-25-3-Billion-by-2029-with-a-CAGR-of-5-9-during-the-forecast-period.html

Carbon Captured Ethanol

To reduce carbon emissions, companies are exploring carbon capture technology and converting carbon dioxide into ethanol. Aptly named Air Company, best known for its Air Vodka "the world's first carbon-negative spirit," has debuted Air Eau de Parfum, "the world's first fragrance made from air." Made in collaboration with Joya, this limited-edition, unisex scent features the company's ethanol captured from its carbon conversion technology. Inspired by the elements of air, water and sun, the citrus fragrance contains notes of fig leaf, orange peel, violet, jasmine, sweet water, powdery musk and tobacco.

Coty Inc. has announced it will be rolling out fragrances using CarbonSmart ethanol produced by LanzaTech. The ethanol is created by capturing and fermenting carbon emitted by industrial activity before it is released to the atmosphere.

Celebrity Scents are a Fragrance Staple

No matter how competitive the fragrance scene is, celebrities refuse to quit launching scents and there's a market for it. As addressed in "Forward Thinking: Fierce Fragrances," article, which appeared in the May 2018 *Perfumer & Flavorist*^h magazine, celebrity fragrances are a fundamental part of the fragrance landscape. Women celebrities are adding new fragrances to their empires, while new and iconic women are joining the fray with warm, sensuous scents packaged in brown bottles.

In February of this year, Britney Spears added Blissful Fantasy to her fragrance franchise, which, according to *Fragrantica*ⁱ, is her 34th scent. The perfume is described as sunny, woody, white and floral, and contains lily, honeydew melon, freesia, jasmine, tuberose, tiare, musk, sandalwood and orris notes. Similarly, Jennifer Lopez introduced One, her 32nd fragrance according to *Fragrantica*ⁱ. The floral fragrance has pink pepper, jasmine, freesia, peach blossom, suede, sandalwood, moss, cedar and patchouli. Also in February, Paris Hilton launched Ruby Rush, making this Hilton's 29th fragrance. The scent has cherry, hibiscus, whipped cream, raspberry blossom, dahlia, waterlily, sandalwood, vanilla and musk accords.

Rihanna's Fenty Eau de Parfum launched on August 10, 2021 and sold out within a day. It was restocked in December 2021 and didn't last long. The fragrance draws inspiration from

^hwww.perfumerflavorist.texterity.com/perfumerflavorist/may_2018

ⁱwww.fragrantica.com/designers/Britney-Spears.html

^jwww.fragrantica.com/designers/Jennifer-Lopez.html



Air Eau de Parfum is dubbed "the world's first fragrance made from air" using Air Company's ethanol captured from its carbon conversion technology. PHOTO CREDIT C/O Air Company

Barbados, France, New York and California and features notes of magnolia, musk, tangerine, blueberry, Bulgarian rose absolute, geranium and patchouli. The juice and bottle represent Rihanna and the scent is housed in an amber-brown glass bottle that was designed to fit in the musician's palm. Billie Eilish partnered with Parlux on her debut signature fragrance, Eilish, which also sold out a day after its release on November 10, 2021. It is now available

exclusively at Ulta Beauty. Described as an amber gourmand, the fragrance highlights mandarin, red berries, sugared petals, creamy vanilla and warm musk accords.

Iman designed the Love Memoir fragrance in honor of her late husband, David Bowie. It debuted on HSN on November 17, 2021, and contains vetiver surrounded by bergamot, blackcurrant, coconut, rose, jasmine, orris, vanilla and patchouli.



Billie Eilish is the latest celebrity to launch a signature fragrance. Eilish's scent is vegan and cruelty-free with mandarin, red berries, sugared petals, creamy vanilla and warm musk accords. PHOTO CREDIT C/O Parlux Ltd.

A Fragrant Landscape

Still weary of the pandemic, fragrances can enhance consumers' moods. The latest developments are in mood-enhancing scents that support consumers' mental well-being. The dizzying amount of plant-based food and beverage launches has spilled into fine fragrances. Brands are creating vegan formulas with upcycled ingredients and carbon captured ethanol. Naysayers want to believe that celebrity fragrances are dead. However, celebrity fragrances are mainstays and a fundamental portion of the fragrance landscape. Expect to see more mood-boosting aromas, sustainable ingredients as well as formulas and new celebrity fragrances.



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