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Forward Thinking: Fierce Fragrances

Fine fragrance activity is being driven by new entrants, fashion designers, pop culture icons and entertainers and wearable scents. Novel packaging, fragrance focused retailers and interactive scent experiences continue to attract consumers.

Trendincite's *Perfumer & Flavorist* "Forward Thinking: Fragrances of the Moment" article, which appeared in June 2017, explored fine fragrance activity. Many of the trends identified continue including innovative packaging, fragrance focused retailers and interactive scent experiences. In addition, the most recent fine fragrance activity is being driven by new entrants, fashion designers, pop culture icons and entertainers and wearable scents.

According to Fact.MR¹, the global fragrance market is expected to reach \$70,000 million by 2022, increasing at a CAGR of 6.2% during the period. According to Wise Guys Reports², synthetic fragrance will dominate the fragrance market and is projected to reach \$11,838.77 million by 2023 at a CAGR of 4.80%. Furthermore, the natural fragrance segment is projected to reach \$5,661.26 million by 2023 at a CAGR of 6.41%. In Western Europe, according to Euromonitor International³, the men's and women's fragrance market rose just 0.9% in 2016 to reach \$13.6 billion.

Data from The NPD Group Scentiments⁴ program found that women in the U.S. are 35% more likely than men to let their moods dictate the scent they will wear each day, encouraging a stronger emotional tie to fragrance than their male counterparts. In addition, the study found that women purchase a new fragrance as often as once a month, compared to men who purchase it an average of 1-2 times per year, typically for the

purpose of replenishment. Whereas men typically take about 30 seconds to sample and decide whether to buy a fragrance, women take anywhere from 10-20 times longer. Historically, fragrance brands have used traditional media to advertise. However, in recent years, fragrance brands have pivoted efforts and budget allocation towards digital channels. According to L2⁵, fragrance interactions increased by 33% on Facebook and over 200% on YouTube and Instagram.

New Players

Like other categories, the fragrance space is crowded. As brands look to grow, some create line extensions, new applications or expand into other categories related or unrelated to their core competences. Some companies use in-house technologies and apply them to new products, while others create collaborations. A variety of new fragrance players have been entering the market.

Glossier, the cult-beloved beauty brand, released **Glossier You** eau de parfum in November 2017. The opaque white glass bottle with a red cap is ergonomic with a thumb-print that allows the fragrance to be held comfortably in the hand. The juice is described as a "skin smell enhancer" that is "creamy, sparkling, clean, and warm" and contains ambrette, ambrox, musk, iris root and pink pepper accords. To celebrate the launch, Glossier created a pop-up shop located at the brand's showroom in New York City's Soho neighborhood. Mimicking the red outer package of the perfume bottle, the door and windows were red glass and the inside was described as a "jewelry box with lush red velvet accents and lots of mirrors." In February, Glossier released Glossier You in an anhydrous solid format that is encased in a weighted metal compact sculpted with the signature thumb-print and a flippable hinged swivel.



Glossier You features an ergonomic thumb-print on the bottle that allows the fragrance to be held comfortably in the hand and the juice is described as a "skin smell enhancer." Photo courtesy of Glossier.

In January, subscription perfume service Scentbird announced that they will distribute Glossier You fragrance through its service. In addition, Scentbird branched out and launched a hand cream collection in six fragrances formulated with fruit extracts, vitamins A and E and aloe. All fragrances are cruelty free and do not contain parabens or sulfates. **Cucumber & Lotus** has notes of cucumber and lotus blossom and is formulated with natural cucumber extract while **Earl Grey & Blackberry** blends earl grey and berry accords and contains natural blackberry fruit extract. **Pineapple & White Amber** contains notes of pineapple and amber and features natural pineapple extract and **Rose & Prosecco** is formulated with real rosehip oil and has rose notes. **White Tea & Fig** highlights Russian tea with sweet fig and natural white tea extract and **Yuzu & Ginger** is formulated with natural ginger extract.

Ouai, the cult hair care brand by celebrity stylist Jen Atkin, debuted **The Limited Edition Ouai Perfume collection** in three scents in December 2017. The fragrances are inspired by fine French fragrances, Hawaii and the Middle East, as well as existing scents used in Ouai's hair care range. **Mercer St.** features Italian lemon, Turkish rose, jasmine and white musk and shares the scent used in the brand's shampoo collections. **Rue St. Honore** highlights floral notes of violet, gardenia and ylang

ylang combined with white musk like the brand's original hair oil. **Melrose Place** contains bergamot, lychee, cedarwood and white musk and smells of the brand's signature rose hair and body oil. **Clare Vivier**, the handbag and accessories designer, ventured into beauty in November 2017 with the launch of **Angie**, (her middle name), eau de parfum that fuses hinoki, bergamot, geranium, citrus and cuir.

Founded by husband and wife Gilad Amozeg and Ariella Appelbaum, **A.N Other** is a new limited-edition signature gender-neutral fragrance line for women and men. The couple wanted to challenge the traditional approach of perfumery and hand-picked a group of world-renowned perfumers and gave them a blank canvas and unlimited budget to create four luxury signature scents that are high-quality, ethically-sourced and cost \$60. **Floral 2018** created by Nathalie Benareau includes a base of dark leather and jasmine with notes of cotton candy and herbal mate. **Fresh 2018** crafted by Carlos Viñals is inspired by classic gin cocktails and features notes of juniper, ginger and metallic musks. **Oriental 2018** designed by David Apel is a mix of driftwood and a cannabis accord with citrus, coffee and chocolate notes. **Woody 2018** made by Patricia Biulodeau highlights sandalwood and pear accords.

Essential Oils Continue

Trendincite's *Perfumer & Flavorist* "Forward Thinking: The Natural Evolution" article, which appeared in April 2018, explored naturals and eco-friendly products across a variety of applications including fine fragrance. OnBuy.com's research⁶, which surveyed 2,400 UK consumers, found that 64% of customers planned to buy a vegan fragrance in 2018. According to NPD research⁷ presented by Larissa Jensen at the CEW beauty industry review, 20% of consumers would wear more fine fragrance if they could find a natural product, while 12% are willing to pay more for natural fragrances. Activity in eco-friendly fragrances and essential oil use continues. Here are a few, notable new launches.

In January 2018, Target debuted its first exclusive fragrance collection, **Good Chemistry**, which is made with essential oils and are vegan and paraben free. Inspired by different personalities, the line includes four collections: **Confident and Charming**, **Cool and Collected**, **Good and Grounded**, and **Vibrant and Playful**. Each collection has four individual scents that are packaged differently and are available in perfume, body spray and rollerball formats. **Confident and Charming** features **Gardenia Palm**, **Jasmine Rose**, **Magnolia Violet** and **Vanilla Orchid** scents, while **Cool and Collected** offers **Cool Glacier**, **Mineral Desert**,



Target's first exclusive fragrance collection Good Chemistry is made with essential oils and is vegan and paraben free. Good Chemistry is available in 16 fragrances in four collections. Pictured above are Good and Grounded Sugar Berry, Vibrant and Playful Queen Bee, Cool and Collected Mineral Desert and Confident and Charming Jasmine Rose and Gardenia Palm. Photo courtesy of Target.

Rustic Woods and **Silver Coast** fragrances. Good and Grounded includes **Apricot Bloom**, **Blue Bell**, **Sugar Berry** and **Water Lily** aromas and Vibrant and Playful has **Brainiac**, **Daydreamer**, **Queen Bee** and **Wild Child** scents.

Clean extended its Reserve line with the **Reserve Avant Garden Collection** in six fragrances: **Galbanum & Rain**, **Hemp & Ginger**, **Muguet & Skin**, **Saguaro Blossom & Sand**, **Sweetbriar & Moss** and **White Amber & Warm Cotton**. The sustainable fragrances use raw materials from farmers from the south of France through Clean Reserve's partnerships and are sold exclusively at Bloomingdale's. At the end of January 2018, Chopard, the fine jeweler, debuted its **Gardens of Paradise** quartet of fragrances "consisting of 25 lush ingredients sourced from around the world under its Naturals Together sustainability program." Firmenich's master perfumer, Alberto Morillas, was commissioned to craft the four scents: **Jasmin Moghol**, **Miel D'Arabie**, **Orange Mauresque** and **Rose Seljuko**. **Hercules Man** is a new line of four plant-based fragrances and aftershaves. The

fragrances are named for regions in Greece and are formulated with natural essential oils, resins and extracts in organic grain alcohol. **Mykonos** and **Lakonia** launched this year and **Evros** and **Pella** will roll out in time for Father's Day.

High Fashion

Fashion designers are not new to fragrance. They often branch out and launch fine fragrances as an extension of their brands and create mini fragrance wardrobes and collections. There has been quite a bit of activity in designer fragrance extensions and introductions. Genderless scents, amber scents and runway launches are popular themes.

In June 2017, **Thierry Mugler** launched **Aura**, which combines animalic and botanical nuances. The scent is based on three interconnected hearts: "the instinctive heart (tiger liana), the botanical heart (rhubarb leaf and orange blossom) and the carnal heart (Bourbon vanilla pod and wolfwood)." The emerald green, multi-faceted heart bottle with a metal letter "M," was designed by Mugler and a sculptor. In February 2018, luxury fashion company **Versace** released **Dylan Blue** pour femme, which contains notes of blackcurrant sorbet, Granny Smith apple, floral tones and woody base notes of styrax, musk and patchouli. Also in February, **Proenza Schouler** debuted **Arizona**, under a license agreement with L'Oréal. Arizona is centered on a white cactus flower accord with a unique mineral signature as well as orris, jasmine, orange flower, solar accord, musk and cashmeran. In March 2018, **Louis Vuitton** launched **Le Jour Se Lève (Daybreak)**, a new fruity floral women's fragrance that is based on four key ingredients: Sicilian mandarin from the coast of Calabria, French cassis from Burgundy, jasmine sambac from China and incense from Somalia. **Revlon** announced its partnership with UK fashion brand **AllSaints**, which will be launching a fragrance collection in the fall.

Genderless

Trendincite's *Perfumer & Flavorist* "Forward Thinking: Fragrance Frenzy" article, which appeared in June 2016, explored gender-neutral fragrances and the trend continues. In the fall of 2017, **Maison Margiela** extended the **Replica** fragrance collection with the launch of **Wicked Love**. Like other Eaux de Parfum, the scent is unisex and features a "gender anonymous" interpretation of rose inspired by centifolia roses. Additional notes include jasmine, vetiver, cedarwood and white musk. Also in the fall of 2017, French luxury perfumer **Guerlain** rolled out **Lui**, a "new gender order" fragrance. The scent is self-described as a spicy woody floral with benzoin,



Roland Mouret and Etat Libre d'Orange's Une Amourette fragrance is a "sexy concoction of neroli, iris, vanilla and akigalawood," which is meant to be spritzed between the legs and is activated when walking. Photo courtesy of Etat Libre d'Orange.

carnation and leather notes. **Frédéric Malle** debuted **Music For A While** in March, which is an oriental perfume composed by IFF master perfumer, Carlos Benaim. The scent is based around lavender and blended with patchouli, amber and vanilla notes.

Amber in the Spotlight

In November 2017, **Dolce & Gabbana**, the Italian fashion brand expanded its exclusive **Velvet Collection** of artisanal fragrances with two new perfumes: **Amber Skin** and **Amber Sun**. The fragrances are “modern interpretations of the amber accord, celebrating the meeting of East and West” and were inspired by the riches of Arab Sicily. In March 2018, **Narciso Rodriguez** released a trio of fragrances: **Amber Musc**, **Rose Musc** and **Santal Musc** sold exclusively at Harrods. Amber Musc is a tribute to the culture of the Middle East and combines oud wood, black patchouli and orange blossom. Rose Musc is formulated with Moroccan rose extracts, saffron, labdanum, black pepper and patchouli, while Santal Musc features floral and woody tones of sandalwood, amber, vetiver, ylang ylang and cardamom.

On the Runway

In September 2017 at **Roland Mouret**'s spring/summer 2018 fashion show, the designer unveiled his first fragrance, **Une Amourette**. The fragrance was created by Givaudan perfumer Daniela Andrier with French perfumery Etat Libre d'Orange. According to the Etat Libre d'Orange “Roland drapes bodies and [they] drape skin” and the concept to collaborate was conceived eight years ago. The “sexy concoction of neroli, iris, vanilla and akigalawood” was spritzed between the model's legs and was designed to be worn “on the pulse point between the thighs” and “activated” when walking. Also, in time for his spring/summer 2018 runway show, **Tom Ford** debuted **Fucking Fabulous**, a limited edition scent. The racy named oriental leather scent includes almond bitter oil, tonka bean, orris, amber, leather and clary sage. Off-White's Virgil Abloh and Byredo's Ben Gorham have co-branded **Off-White x Byredo**, a new fragrance dubbed “**Elevator Music**,” which will launch in May 2018. The fragrance has notes of midnight violet, bamboo, ambrette and amirs and is available in eau de cologne, hair perfume and hand cream.

Lifestyle & Entertainment

Celebrities, artists and entertainers are the foundation of pop culture. Celebrity fragrances are part of the fragrance landscape and both old and new artists are introducing new scents. **Britney Spears** launched **Sunset Fantasy** in 2017, and it is the artist's 23rd fragrance in her empire. The fragrance has notes of grapefruit, mandarin, apple, peach, raspberry, orange blossom, vanilla, amber, sandalwood and steamed, frothed milk. In 2016, it was reported⁸ that Spears annually makes an estimated \$50 million dollars from scent sales alone. **Katy Perry** launched **Indi** in August 2017, her ninth scent. Although it is not labeled as unisex, the scent is self-described as androgynous and includes 11 different types of musks with oriental plum, amber and vanilla. **Chapter One** by **Jennifer Aniston** was released in October 2017, and it is the actress's sixth fragrance sold at Kohl's. The fragrance was inspired by Aniston's "calm and captivatingly chic, coastal lifestyle," with notes of pink pepper, bergamot, orange flower water, jasmine, tuberose, tiare flower, grapevine flower, tonka bean, skin musk and teakwood. In November 2017, under the KKW Beauty brand, **Kim Kardashian West** launched **Crystal Gardenia**, her first scent collection in three fragrances: **Crystal Gardenia**, **Crystal Gardenia Citrus** and **Crystal Gardenia Oud**. The limited-edition trio sold out in less than three days without ever being smelled. Inspired by healing crystals and the smell of the flowers her late father (Robert Kardashian) brought home from business trips, the fragrances are housed in opaque quartz crystal fragrance bottles.

In December 2017, **Diana Ross** partnered with HSN to release **Diamond Diana**, the music legend's premiere fragrance. Inspired by "the powerful connection between music and sensual memories," the fragrance is packaged in a diamond shaped bottle and highlights crisp green accords, mandarin, bergamot, lemon, apricot, spices, coriander, orange blossom, jasmine, sandalwood, black rose, cedar, amber, musk, incense, vanilla and vetiver. In August 2017, **Shawn Mendes** joined the celebrity fragrance movement with the debut of **Shawn Mendes Signature**. The unisex scent is formulated with lemon, pineapple, apple, frangipani, sugar maple, rose, dulce de leche, white cedar and skin musk accords. Inspired by his Canadian roots, Mendes described the scent as "refreshing, woody and comforting."

Dita Von Teese, the infamous burlesque performer and Douglas Little, founder of Heretic Parfums, collaborated to make a **Scandalwood** perfume and candle. According to Little, the fragrance "conveys this idea of sensuality, glamour and seduction," and is based on sandalwood with

Bulgarian rose, coriander, cardamom, leather, oud and musk. Self-described as "The world's first strip-tease candle," the candle vessel is heat sensitive and the image of Dita Von Teese wearing a black gown transforms to a nude Von Teese. When the candle cools, Von Teese is redressed. **Kingsman The Golden Circle** movie sequel launched in 2017, and Agent Harry Hart uses a high-tech aftershave as a bomb to save his life. Inspired by this scene, Matthew Vaughn, director, co-producer and co-writer, partnered with Azzi Glasser to create the **Kingsman TGC fragrance**. The fragrance is composed of Earl Grey tea, neroli, laurel leaf, elemi oil, clary sage, rum, tobacco, vetiver and black oud notes.

Unique aesthetics and convenient ways to use products, such as sprays and rollerballs, allow consumers alternative choices to traditional fragrance applications.

Inspired by the Pussyhats worn during the Women's March in November 2017, Fran Moss filed a "Pussy" trademark for "fragrances for use in manufacturing everything that has to do with beauty, hygiene, sex appeal."

Take Flight

Vying for consumers' attention brands are launching pop-up shops in airports. According to Allied Market Research⁹, the travel retail market size is expected to reach \$125.1 billion by 2023, with a CAGR of 8.9% during the forecast period. Perfumes and cosmetics are forecast to be the highest growing segment followed by wine and spirits. The Asia-Pacific region is the largest travel retail market, with a CAGR of 11%.

From November 21 until December 5, 2017, LVMH-owned Bulgari opened a fragrance pop-up shop at Terminal 2 in the Paris Charles De Gaulle airport, France, which highlighted Bulgari's Le Gemme collection. On December 20, 2017, Yves Saint Laurent Beauté opened an interactive pop-up store in Terminal 2 at London Heathrow international

airport. The shop focused on three brands: Black Opium, Y and Tatouage Couture and used technology to give consumers an interactive experience. An ATM machine dispensed free samples of Black Opium, while the Y fragrance featured an immersive movie playing in-store. Tiffany & Co created a one-of-a-kind pop-up at New York's John F Kennedy International Airport, which was open from January 9 until February 15, 2018. The shop was commissioned by Coty to launch Tiffany Eau de Parfum, the brand's latest fragrance. The store resembled Tiffany's signature blue gift box and the Pantone Tiffany blue color was used on the installation's exterior.

London Is Calling

Several luxury brands and retailers are opening flagship stores in London. Brick and mortar stores, as well as an online presence, are important to attract and retain consumers.

According to BookingBug's research¹⁰ of 2,000 U.S. and UK consumers, 73% of shoppers research online before hitting the stores and 54% research in-store before buying online. Although online shopping is the fastest growing, stores remain the most popular channel for shopping with 41% of consumers in the UK and 52% in the U.S. citing it.

After an initial six-month pop-up, **Experimental Perfume Club** moved to a permanent address in Netil House, East London in June 2017. Self-described as an "open-access fragrance laboratory and perfume creation studio," consumers are invited to create their own scents or learn about scent through workshops and one-on-one consultations. In November 2017, the UK fragrance brand **Floral Street** opened its first flagship store in Covent Garden, London. The brand was named after a road in WC2 (London, UK) and is a "modern collection of fragrances, powered by flowers." On the first Tuesday of every month, Floral Street hosts classes taught by Robertet, which teaches consumers the science and skill of fragrance blending. At the end of 2017, **Atkinsons**, the distinctively British perfume brand founded by James Atkinsons in 1799, returned to London and opened a new three-floor flagship on the Burlington Arcade. The retailer specializes in luxury scents, watches and cosmetics. The original fragrances have been reinterpreted with eight in the Legendary Collection, while an additional eight fragrances have been



Olfactory NYC features nine fragrances that are curated by top perfumers and are without designer logos, celebrity endorsements or complex packaging and can be customized. The concept behind the store is "to make fine fragrance fun and interactive, while using only the best ingredients." Photo courtesy of Olfactory NYC.

newly formulated in the Contemporary Collection. In addition, there are signature fragrances named after Atkinsons' former and current address and an oud range in four variants. Customers can book an hour-long private consultation, which is complimentary in exchange for the purchase of a fragrance. In January 2018, **Les Senteurs**, London's oldest independent perfumery, reopened its Belgravia flagship store after months of redesigns and renovations. The luxury fragrance retailer offers over 350 curated fragrances. To help customers narrow down their olfactive preferences, the retailer's website uses the SenteurSystem, which features fragrances color-coded within nine categories, such as chypre, hesperide/citrus, fruity, leather/tobacco and woody/fougere. Also, in January 2018, the **Fragrance Shop**, which has 212 stores throughout the UK, launched a fragrance subscription service for customers to try out a different designer scent in an 8ml atomizer sample for £12 a month. In February 2018, **Miller Harris** opened a new flagship store in Canary Wharf, London. Designed in collaboration with London's Fabled Studio, "each scent has been married with a corresponding sound and texture, inviting visitors to not only smell but also hear and feel their fragrance prior to making a selection." In addition, the shop will feature a rotation of in-house resident artists who will add their unique creativity onto the bottles and candles, tailoring them to each customer. **Byredo**, the cult



Perfumarië is a 600-square-foot space, which features 32 unlabeled scents on tap with clay tagines to smell. To enable customers to smell without being influenced by marketing, the fragrances are not branded and there are no names, packaging or marketing materials. Photo courtesy of Perfumarië.

Swedish fragrance and luxury brand, is opening a three-story flagship store in London in June 2018. In addition to offering its fragrance, beauty and leather goods, the store will also have a gallery space for collaborative projects.

On November 20, 2017, the first **Tom Ford Beauty** standalone store opened in the historic Covent Garden neighborhood in London. The boutique highlights Tom Ford's collection of makeup, skincare and fragrance for women and men and features designated rooms. The fragrance room showcases a dedicated interactive scenting installation where guests can digitally explore the artisanal private blend collection and a dramming bar that offers customized services such as luxury sampling and scent styling. New York-based perfume house **Bond No. 9** opened an ultra-luxurious boutique at Harrods' Salon de Parfums, on the 6th floor of the London store in November 2017. The private, by-appointment-only boutique offers bespoke services such as fragrance tastings, detailed consultations and happy hours.

Store This

In addition to London, luxury brands and independent retailers are opening stores in Canada, Europe, India, the Middle East and the U.S. In December 2017, French luxury brand **Hermès** reopened its Toronto flagship store at a new location on Bloor Street. The 6,000-square-foot retail space features two floors. The ground floor exhibits the brand's iconic silk scarves and jewelry section

and has a dedicated space for the brand's full range of fragrances. Also in December 2017, Hermès launched a dedicated perfume boutique in Dubai at the Mall of the Emirates. It is the second store of its kind and offers the entire range of Hermès perfumes as well as Le Bain Hermès (bath collection) and Le Parfum de la maison (home fragrance collection). **Chanel** opened its first fragrance and beauty store in Milan, which is the label's third freestanding beauty store in Italy, after the ones in Florence and Venice. **Comptoir Sud Pacifique**, the French fragrance house, opened a second Parisian boutique in the Left Bank district of Saint-Germain. In February 2018, **Scentido**, a niche fragrance store with a curated range of rare perfumes from the U.S., UK and Europe, opened in South Mumbai, India.

In November 2017, **Olfactory NYC** opened its doors in New York City's Nolita neighborhood. The store offers a collection of nine fragrances that are formulated with "the highest quality ingredients" and bottled fresh in the studio. For customers who want to custom-design their personal scent, Olfactory offers the option to blend specific accords that "emphasize certain emotions inherent to each scent." The fragrances are curated by top perfumers and are without designer logos, celebrity endorsements or complex packaging. "We want to make fine fragrance fun and interactive, while using only the best ingredients," states JJ Vittoria, Founder. **Perfumarië**, self-described as "a meta discovery studio, open-access event space, & incubator for retail and multi-sensory experiences," also launched in November. Located in New York City's Soho neighborhood, the 600-square-foot space features 32 unlabeled scents on tap with clay tagines to smell. To enable customers to smell without being influenced by marketing, the fragrances are not branded and there are no names, packaging or marketing materials. Customers can select two fragrances to try on skin and then walk away with one 5ml sample of their favorite. Each month the shop hosts a reveal party of the 32 blind scents and new fragrances are put on tap.

In December 2017, SoulCycle, New York's trendy fitness studio with 80+ studios in nine states, announced that the gym partnered with **Le Labo** to provide Bergamote 22 shampoo, conditioner, body wash, face wash, body lotion and hand soap to its members. Designed with millennials in mind, New

York City's Saks Fifth Avenue's 2nd floor beauty initiative expected in May 2018, will include a Gucci beauty space, the first in the world, an EB Florals shop that will sell custom bouquets and matching fragrances, an apothecary, the first U.S. FaceGym outpost and 15 spa rooms.

Good Things Come in Small Packages

The packaging of a fragrance and its application are important details and help brands differentiate from their competitors. Unique aesthetics and convenient ways to use products, such as sprays and rollerballs, allow consumers alternative choices to traditional fragrance applications. In May 2017, Byredo debuted the **Byredo Kabuki Perfumes** collection inspired by the Japanese cosmetic brushes used in the theater. The new application is a retractable fine-haired brush that houses a powder perfume in the brand's three core scents: **Bal d'Afrique**, **Blanche** and **Gypsy Water**. A similar and novel application is **Jo Malone's Jo Love's Fragrance Paintbrush**^a, which launched in September 2017. With a "your body is the canvas, you are the artist, now paint with fragrance" slogan, the application uses a gel formula to hold the fragrance that dries in seconds. **Scent Republik** is a UK-based company founded by two fathers looking for safe, fun and relatable products that they would be comfortable buying for their own tween daughters.

Looking for a more playful way to apply fragrance, the brand created **Scent Stiks**, which resemble a marker pen and allow young adults to apply a scented "tag" to their skin. The brand launched in November 2017 with three initial mood related scents. **Chill Stik** elicits relaxation and has notes of citrus, apple blossom and marine accords; **Whoosh Stik** is fantastical and contains cassis, raspberry and strawberry notes; **Fab! Stik** is about inner girl power with notes of vanilla, mandarin and praline. An additional three scents are in development. Although not new, a notable application is **Pinrose's** perfume "petals," which are towelettes that contain a "perfectly measured dose" of fragrance.

In January 2018, **Chanel** introduced **Chance Eau Tendre Fragrance** in a cushion compact application with a soft silicone applicator. Chanel describes it as "the romantic, fruity-floral scent in an innovative and sleek cushion compact for fragrance touch-ups on the go." **Cacharel's** new **Yes I Am** fragrance is for the millennial audience and is packaged in an oversized red lipstick-shaped bottle. According to the press release, the fragrance is released through a complex system and uses seven separate pieces



Scent Republik, a UK-based brand, created Scent Stiks, which resemble a marker pen and allow young adults to apply a scented "tag" to their skin. The products are available in the three scents shown. Photo courtesy of Scent Republik.

instead of the conventional two pieces. **Yes I Am** is currently sold in travel retail in Europe, the Middle East, Africa and India and will be rolled out to the U.S. in June. The fragrance includes notes of cardamom, raspberry, mandarin, jasmine, gardenia and sandalwood. In honor of Valentine's Day, under her **KKW Fragrances** brand, **Kim Kardashian West** dropped three **Kimoji Heart Fragrances**. The fragrance bottles are in the shape of Sweethearts (also known as conversation hearts) candy and feature the scent's name. **Bae** is packaged in a light blue heart and contains mandarin, kiwi, jasmine sambac, gardenia, vanilla and sandalwood. **BFF** is housed in a pink heart and has notes of wild berries, star apple, pink rose petals, pear blossom, vanilla marshmallow and cedarwood, while **Ride Or Die** is in a purple heart formulated with black berry, purple plum, night blooming jasmine, raspberry nectar, caramel and tonka bean.

Wearable Scents

In addition to unique fragrance applications, wearable scents that are embedded in objects are emerging.

Cor Pendant is a line of "wearable aromatherapy" necklaces offered in gold, rose gold and silver, which hold replaceable wicks that contain an exclusive aromatherapy blend that provide mood-lifting benefits. The products are self-described as "effortless and versatile [with] the benefits of essential oils without the mess or fuss" and are offered in three blends: **Calm**, **Energy** and **Focus**. Los Angeles-based jewelry designer and perfumer, **Lisa Hoffman**, has added the **Neo-Ethereal** jewelry collection to her range. The jewelry spotlights

^a Jo Love's Fragrance Paintbrush is trademarked.

stylized scent-vessel-charms in earrings, bracelets and necklaces. The **Invi** bracelet by Roel van der Kamp was unveiled at the Consumer Electronics Show (CES) in Las Vegas in January. The Invi bracelet was designed as a wearable, discrete safety bracelet meant to be used for self defense. The brand's slogan "The nonviolent self-defense bracelet that uses smell to repel," is for one-time use. If in an unsafe situation, the wearer can open the silver-clasp band to emit an unpleasant smell meant to distract an attacker.

Although the shelves are crowded, consumers and retailers continue to make space for new fine fragrance entrants and established brands.

Kilian Hennessy and French accessory designer Elie Top, created a scented jewelry collection, **Elie Top for Kilian**. The collaboration debuted in October 2017 and donned eight pieces inspired by "the golden age," and was comprised of amulets, bracelets, earrings and rings. In addition, in November 2017, **By Kilian** partnered with French luxury brand **Fleur du Mal** to launch a capsule collection of perfumed lingerie with the By Kilian's Love, Don't be Shy scent, which has notes of orange blossom, iris, rose and amber. The lingerie uses micro-encapsulation and the fragrance is released with the movement and heat of the body.

Interactive Scent Experiences

Fragrance and its packaging is an art form. To extend the art of fragrance, there has been a variety of interactive scent experiences created for the public. From Fragrances curated "**Perfume Flacons – Vessels for Seductive Fragrances; The Storp Collection – From Antiquity to the Present Day**" on display from October 21, 2017 through April 8, 2018, at the Spielzeug Welten Museum in Basel. The exhibition featured a collection of more than 500 extraordinary flacons from over 5,000 years.

From December 6 through December 10, 2017, at the Aqua Art Miami, Morphew, the luxury vintage clothing retailer and lifestyle brand, presented an

exhibition called, "**Which Comes First, the Art or the Fashion?**" The exhibit displayed avant-garde fashion items such as Jean Charles de Castelbajac's Teddy Bear jacket, Gianni Versace's Warhol, Marilyn and James Dean dress, and a Keith Haring Stephen Sprouse denim suit. Symrise perfumer Maurice Roucel created a **Morphew** fragrance specifically for this event. The fragrance included notes of mandarin, lotus, gin berry, lily of the valley, pink peony, queen of the night jasmine, blonde woods, purple vanilla orchid and white patchouli. On January 2, 2018, Equinox Fitness, the American luxury fitness company, released the "**Commitment, A Collection by Equinox**" exhibition through social media and select Equinox club windows nationwide "as a nod to luxury retail shop displays." The collection highlighted seven exclusive fashion and beauty items created to embody the commitments of seven inspiring people and the items were not for sale. **Eau De Blood, Sweat & Tears** fragrance was one of the seven items and was created by 12.29. It was an ode to Kathrine Switzer, the first woman to run the Boston Marathon, and her commitment to equal rights for all female athletes. According to the release, the scent was infused with Switzer's actual DNA, and the bottle was designed by architect by Rafael de Cardenas.

In October 2017, perfumer of Maison Cartier, Mathilde Laurent partnered with architecture-based Munich climate engineers Transsolar, to create the "**Unidentified Scented Object**," at the Palais de Tokyo in Paris. The installation was dubbed a "window to olfactory art" and featured a large glass cube with a single staircase that twists through a floating cloud of Cartier's L'Envol (The Flight) scent. In December 2017, perfumer of Maison Cartier, Mathilde Laurent, Olivier Darné, a Paris-based artist and an urban beekeeper, and Michelin star chef, Alexandre Gauthier collaborated to create a "sense memory" 11-course meal in New York City. Also inspired by Cartier's L'Envol fragrance, there were honey wax plates, wax wine cups and wax butter holders in the shape of mini-cones and the meal focused on all aspects of honey. It was a lunch for exploration, art and creativity and focused on "the process of layering - the layering of wax, the layering of notes, and the layering of ingredients."

From February 8 until February 23, 2018, at the Gallery at The Sheen Center in New York City, artist Jared Boechler exhibited "**On a Tipped Chair**," which was "an olfactory-visual show" that paired oil paintings and perfumes. Inspired by emotions triggered by a particular scent, the show displayed oil paintings accompanied by scents in the form of leather straps placed under tiny bell jars created in collaboration with the House of Cherry Bomb

Perfumery. In March 2018, Sfumato Fragrances, a Detroit-based custom perfume shop, unveiled **Castalia**, a bar that serves scented cocktails based off of the store's scents.

This year, Givaudan fine fragrance has embarked on a new global initiative called **Project Delight**. Created in collaboration with perfumers and flavorists, the project features taste experiences such as fruitiness, sweetness, juiciness, tanginess and savory that are translated into scents. Givaudan describes Delight as "fragrances in 3D, with new depths of sensorial experience." Scents of plates by Chef Tessa Liebman of Methods & Madness, is a series of dinners and events that celebrate the senses and the art of perfumery. Chef Liebman's latest event was the "**Bunch of Roses**" dinner held on March 13, 2018, which featured a six course meal with beverage pairings based on different rose scents and their back stories and ingredients. March 21, 2018 was **National Fragrance Day** and the Fragrance Foundation promoted the holiday through social media, front-window and mural displays around New York City and a multisensory pop-up shop. Across the pond, The Perfume Society launched the #smellfie social media campaign, which asked

consumers to post a selfie with a fragrance in honor of National Fragrance Day 2018.

Tech Time

Ranging from devices and apps to genetically engineered molecules, there has been some interesting activity in fragrance technology.

Billed as the first in-home dispensary, **Oblend**, by Seattle-based Altopa, Inc., was a CES 2018 Innovation Awards Honoree. The countertop device and companion app, precision blends essential oils and other botanical extracts for use in creating essential oils, massage oils, aromatherapies, lotions, tinctures, culinary oils, drinks, vapes and supplements from legal herbal extracts. The **Perfumist** phone application for smartphones is the latest fragrance app that allows users to search a database of 13,000 perfumes based on brands, gender, notes and new releases.

In Mexico City, Emily Greenhagen, an MIT alumna and director of fermentation engineering at Ginkgo Bioworks (a Boston-based synthetic biology company), is exploring tailoring microbes to produce different materials. Greenhagen has genetically engineered yeast that synthesizes lactones (a family

of molecules responsible for the aromas of butter, cheese, fruits and flowers) designed to be a rose perfume made from these yeast cells.

The Future Is Fine

Although the shelves are crowded, consumers and retailers continue to make space for new fine fragrance entrants and established brands. The total number of prestige fragrance launches rose 6% in 2017¹¹, according to Larissa Jensen, executive director, beauty industry analyst, NPD Group. The overall fragrance category rose 4%, while naturally positioned fragrances showed a 32% increase, artisanal fragrances increased by 14% and fragrance e-commerce grew 23%. These statistics confirm many of the fine fragrance trends identified and are an indication of where the fragrance market is headed.

Alternative applications and novel packaging, fragrance-focused retailers and interactive scent experiences remain key drivers used to attract consumers. Pop-up shops in airports are currently on trend and London is a hot spot booming with specialty fragrance boutiques. Fashion designers as well as pop culture icons and entertainers are the current celebrities leading market activity.

As consumers gravitate to cleaner eating and better-for-you lifestyles, their interest in natural fragrances and essential oils escalates. Wearable scents that are embedded in objects and a variety of fragrance technologies are emerging. All of these developments will continue to propel fragrance innovation and create opportunities and challenges for brands and fragrance suppliers.

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