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## Forward Thinking: Fragrances Spring Forward, Part 1

Current fine fragrance activity is being driven by experiential retailers, custom fragrance technology, natural fragrances, gender-fluid launches, hero ingredients, eye-catching packaging, book releases and beverages using scents to enhance the olfactory experience.

*Editor's Note: You can read part 2 in the May Digital Magazine on page DE 1.*

**T**rendincite's *Perfumer & Flavorist* "Forward Thinking: Fierce Fragrances" article, which appeared in May 2018, examined new fine fragrance entrants, including fashion designers, pop culture icons and entertainers as well as novel packaging, fragrance-focused retailers and interactive scent experiences. These trends continue and are still relevant. Current fine fragrance activity is being driven by experiential retailers, custom fragrance technology, natural fragrances, gender-fluid launches, hero ingredients, eye-catching packaging, book releases and beverages using scents to enhance the olfactory experience.

## Numbers at a Glance

According to the NPD Group<sup>a</sup>, in the third quarter of 2018 (July-September), U.S. fragrance sales increased 6% to \$783.6 million, and growth was driven by a 9% increase in fragrance juice sales. In addition, women's sales increased 8%, while men's were up 12%. According to Euromonitor International,<sup>b</sup> the premium men's fragrance sector had a retail sales value of nearly \$1.6 billion in 2017 and is expected to grow by 10% to \$1.7 billion by 2022. Additionally, Euromonitor International<sup>c</sup> predicts that the global fragrance market will grow close to \$70 billion by 2022, up from \$37 billion in 2017. By 2024 the market is estimated to be worth approximately \$92 billion. Euromonitor International's data<sup>d</sup> also revealed that sales of premium fragrances targeted at both men and women have grown 25% globally from 2012 to 2017. In the APAC region, sales grew 53.1% for the same period. According to IMARCC<sup>e</sup>, in 2017, the fragrance market in the United Arab Emirates (UAE) was worth \$403 million, and it is forecasted to reach \$685 million by 2023, with an annual growth rate of 9%.

## Experiential Retailers

In today's experiential economy, brands are continually looking for ways to attract consumers. Retailers are creating experiential and engaging environments to educate consumers and showcase their products.

**Claus Porto**, the Portuguese beauty and fragrance brand, opened its first international store in New York City's trendy Nolita neighborhood. The

store was designed by Jeremy Barbour of Tacklebox Architecture and features a forty-two-foot-long freestanding archway made from Portuguese cork, a tiled tunnel and a decorative Estremoz marble washbasin, which is the same as the one in Claus Porto's flagship store. Claus Porto offers the brand's perfumes, eau de cologne, soaps, shaving creams, beauty products and scented candles.

Lifestyle brand Goop by Gwyneth Paltrow has opened **Goop Lab**, its first permanent East Coast flagship store in New York City's NoHo neighborhood. To promote Goop's beauty, skincare and kitchen products, the store will offer in-store beauty services and host cooking demos and events. In Thornton, Colorado at the Denver Premium Outlets, **Perfumania Holdings, Inc.** opened its first concept store, which is self-described as "multisensory fragrance destination that redefines the fragrance shopping experience." The 900 square foot store is designed to engage, educate and inspire consumers and features a hands-on Discovery Hub Scent Finder, a digital tool and an omnichannel Scent Gallery, which enables consumers to explore over 40 fragrances and take-home samples. **Banana Republic** and **Cos Bar** have collaborated to open a shop-in-shop inside Banana Republic's San Francisco flagship store. Cos Bar is known for offering a curated array of beauty brands and an engaging sales experience focused on the needs of the client. The Cos Bar is staffed by Cos Bar employees and features luxury products as well as a cheaper line. Outerwear brand **The North Face** opened the brand's "**Prototype**" Concept flagship store in Williamsburg, Brooklyn offering an exclusive selection of curated lifestyle items, limited editions and brand collaborations. To connect to the community and act as a cultural hub, Prototype will host art and music events. To further engage consumers, the store features an environmental signature scent described as "the ultimate outdoor experience," with

<sup>a</sup> <https://www.gcimagazine.com/marketstrends/segments/cosmetics/In-Prestige-Skin-Care-Continues-Just-Keeps-Growing-499402641.html>

<sup>b</sup> <https://www.glossy.co/beauty/dtc-brand-dollar-shave-club-expands-its-portfolio-with-fragrance>

<sup>c</sup> [https://www.wgsn.com/content/board\\_viewer/#/81413/en/page/4](https://www.wgsn.com/content/board_viewer/#/81413/en/page/4)

<sup>d</sup> <https://www.cosmeticsdesign-europe.com/Article/2018/10/17/Genderless-fragrances-and-the-freedom-it-represents>

<sup>e</sup> <https://us.fashionnetwork.com/news/Fragrance-sales-in-UAE-to-be-worth-685-million-in-2023,1023844.html#>



Claus Porto's first international New York City store was designed by Jeremy Barbour of Tacklebox Architecture and features a forty-two-foot-long freestanding archway made from Portuguese cork, a tiled tunnel and a decorative Estremoz marble washbasin, which is the same as the one in Claus Porto's flagship store. Courtesy of Claus Porto.

top notes of grapefruit, bergamot and blood orange; mid notes of galbanum, violet leaf and moss; and a drydown of patchouli, cedarwood and musk, which was created in partnership with Robertet and diffused by Scent Marketing, Inc.

At the **Atelier Prada** in Singapore, the Italian fashion brand offers a variety of fun and unique packaging choices for their La Femme Prada and L'Homme Prada fragrances. Customers can dress their fragrances in six different vibrant bottle sleeves with graphic designs ranging from masculine geometric prints to feminine florals and decorate them with fashion stickers and metallic initials. After purchase, each fragrance is wrapped in a selection of Prada-patterned tissue papers, ribbons, luxury boxes and retro stickers. Similarly, **Viktor & Rolf** offers the option of customizing the brand's bottles of Flowerbomb, Spicebomb and Bonbon perfumes using the "Dress Up Your Bottle" online platform. Customers can choose from an array of colors and accompanying accessories. The Flowerbomb fragrance is offered in four different bottle designs and the bottle can be engraved.

Although not a retailer, a novel concept is Fragrance creator's **Cinquième Sens** co-working space in Paris, France. The space allows perfumers and brand-owners to work in a dedicated beauty environment with flexible rental opportunities. In the "Take Flight" section of Trendincite's *Perfumer & Flavorist* "Forward Thinking: Fierce Fragrances" article, Trendincite LLC discussed retailers launching pop-up shops and standalone stores in airports. This trend continues and according to Allied Market Research<sup>f</sup>, the global travel retail market size was valued at \$74.9 billion in 2017 and is projected to reach \$153.7 billion by 2025, growing at a CAGR of 9.6% from 2018 to 2025. The perfumes and cosmetics segment accounted for more than 31% of the travel retail market share in 2017 and is expected to dominate the global market by 2025.

Puig partnered with JCDcaux to create a multisensory discovery experience to unveil **Paco Rabanne's** new **Pure XS For Her** fragrance. Located at Terminal 2 in the Paris Charles De Gaulle airport, France, the experience featured an out-of-home media site from Sept. 2018 to Jan. 2019. The multisensory discovery center invited travelers to taste a Pure XS-branded vanilla-flavored popcorn, a key ingredient in the scent, and smell Pure XS fragrance and its masculine counterpart, Pure XS For Him, which were emitted through an automated fan. At the end of the experience, travelers were offered a free sample. In Nov. 2018, digital native brand **Dollar Shave Club** ventured



*Fluid Fragrances is a new line of gender-fluid scents made with between 15% and 30% perfume oil and organic argan oil sourced from a cooperative of Berber women in Morocco. I, AM, HUMAN fragrances shown. Courtesy of Fluid Fragrances.*

into vending machines with trial-size versions of its products including shave, shower, hair care and skin care. According to the company, Dollar Shave Club members will get an app notification when they are near a machine. The machines are located in ten high-traffic areas including mass transit hubs like airports and train stations and shopping centers like malls and stadiums to reach users when customers need them. Locations include the Mall of America in Minnesota, the Transbay Transit Center in San Francisco, Roosevelt Field in Long Island and LaGuardia Airport in New York.

In Dec. 2018, Maison Christian Dior opened its first standalone **Dior Parfums** boutique in Terminal 5 at London Heathrow International airport in partnership with Dufry's World Duty Free. The boutique is designed to "evoke Christian Dior's apartment, La Colle Noir in Grasse, France and a back wall features a virtual snowy window scene of this location." The boutique showcases the full range of 32 artisanal fragrances and the fragrances are color coded and merchandised with related products, such as room candles, hand and bath soaps and body creams. Also in Dec. 2018, **Chanel** has partnered with Dufry to open a standalone beauty boutique at São Paulo-Guarulhos International airport in Terminal 3. Chanel described the space as "a true place of expression with a story to tell" and highlights the French label's fragrances, make-up, skincare and beauty accessories. For example, one area of the boutique was inspired by a curved mirror-lined staircase at the Coco Chanel's Parisian apartment. The décor will change with the seasons and consumers are encouraged to test and play with the products.

<sup>f</sup> <https://www.alliedmarketresearch.com/press-release/travel-retail-market.html>



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## SUSTAINABLE SCENT

Sustainable Scent is Takasago brand that is given to an aroma ingredient made from **renewable resources** and utilizing **Green Chemistry**.



## Custom Fragrance Tech

Technology continues to advance with new digital and interactive fragrance experiences and custom fragrance development.

Scentinvent Technologies' mission is to rethink fragrance form and function to a new level of fantasy. Known for their Linger<sup>®</sup> Fragrance Primer, the company has formulated several new fragrance applications set to disrupt the industry. The **Fragrance Cooler** is a quick dry swivel stick applicator with a cooling sensation while the **Fragrance Melt** is a cream balm that easily melts into the skin and leaves a powder finish. Like cosmetics, the product is customizable with an interchangeable palette. Using many of the company's technologies, Scentinvent will debut their own brand **Scentinvent Pom Pom**, which will focus on unique fragrance forms, textures and experiences.

The **Nota Nota Machine** is a personalized scent mixing machine with an app, which enables users to create custom 5ml bottles of perfume within 60 seconds as well as save the perfume blends and share. The machine uses a series of fragrance cartridges called Tolas, which are available in 12 scents: bergamot, jasmine, magnolia, Taif rose, moss, saffron, vanilla, sandalwood, oud, marine, amber and musk. **Jo Malone London** created a Fragrance Finder digital quiz on Alibaba's Tmall e-commerce platform to enable Chinese users to create customized fragrances. The quiz asks a series of questions related to mood, personality and style that lead to one of 300 possible fragrances made from a combination of 26 scents. The results are shared with product recommendations including their ideal fragrance and other perfumes for layering, as well as descriptions of each scent. To add a more high-touch experience, Jo Malone offers gift boxes, ribbons and handwritten greeting cards during checkout. In Buenos Aires, Argentina, with retail partner **Julieraque**, Coty introduced a multisensorial virtual reality fragrance discovery experience that mixes touch, smell, sound and sight. Shoppers are given a virtual reality headset and select up to seven scent stones, which each represent a unique olfactive territory and activate an eight-second unique video. The fragrance experience comes to life through the scented and texturized stone, 3D visuals and sound. At the end of the video consumers can receive up to six recommendations from the eight Coty luxury brands offered in Argentina based on their top three favorite fragrance territories.

**Trufflebot**<sup>h</sup> is a new electronic nose designed by a group of researchers at Brown University. The

Trufflebot system is comprised of eight pairs of sensors and each pair has a chemical and a mechanical sensor. "The chemical sensors detect the chemical fingerprint of a vapor, while each mechanical sensor detects changes to air pressure and temperature, important contributors to how we humans process sensory information." According to the researchers, the combination of the chemical and mechanical sensors enables the odor to be identified correctly with 95% accuracy. Symrise in partnership with IBM Research developed **Philyra**<sup>i</sup> a method of using artificial intelligence (AI) to create perfumes based on digital fragrance models. The technology is being used to create two O Boticario fragrances, expected sometime in 2019. Similarly, McCormick & Company, Incorporated and IBM Research have collaborated to use AI "to learn and predict new flavor combinations from hundreds of millions of data points across sensory science, consumer preference and flavor palettes." McCormick's first product "One"<sup>j</sup> is expected by mid-2019 and will be a one-dish recipe flavor mix including Tuscan chicken, Bourbon pork tenderloin and New Orleans sausage.

<sup>i</sup> <https://www.symrise.com/newsroom/article/breaking-new-fragrance-ground-with-artificial-intelligence-ai-ibm-research-and-symrise-are-workin/>

<sup>j</sup> <https://www.perfumerflavorist.com/networking/news/company/McCormick-and-IBM-Are-Giving-You-a-Taste-of-AI--505197761.html>



Paris Hilton launched her 24<sup>th</sup> scent Platinum Rush Paris Hilton For Women, "which includes a bright and sophisticated scent that radiates with a sparkling blend of crisp Asian pear, ripe red apple, wet green florals and muguet flowers." Courtesy of Parlux Fragrances, LLC.

<sup>®</sup> Linger is a registered trademark of Scentinvent™ Technologies

<sup>h</sup> <https://thespoon.tech/meet-trufflebot-an-electronic-nose-that-actually-sniffs/>

## Gender-Fluid

Trendincite's *Perfumer & Flavorist* "Forward Thinking: Fierce Fragrances" article, which appeared in May 2018, examined gender-neutral fragrances. Gender-fluid fragrances continue to launch as expressing individuality becomes increasingly popular. UK department store Liberty London saw a 40% rise in the sales of unisex fragrances in store and online in 2018<sup>k</sup>.

**Mx.** by **Eris Parfums** is "named after the gender-neutral title starting to replace Mr., Mrs. and Ms. the 'X' in **Mx.**" The gender-neutral scent contains ginger, saffron, vetiver, black pepper, cedarwood, sandalwood, cacao, benzoin and castoreum. **Fluid Fragrances** is a new line of gender-fluid scents made with between 15% and 30% perfume oil and organic argan oil sourced from a cooperative of Berber women in Morocco. **I** is described as a dirty woody floral, **AM** is a floral herbal citrus, **A** is deep rich vanilla amber, **HUMAN** is a dirty musky rose and **BEING** is deep rich and sexy. Candles, three natural fragrances, shampoo, conditioner, body lotion and wash are all in the pipeline.

**Le Labo** released **Tonka 25**, its first new fragrance in three years. Described as an "addictive, dark fragrance with woody notes and a subtle hint of sweetness," the scent also includes orange flower absolute, cedar atlas, styrax resins and absolute tonka. **Ormaie**, by mother and son team, Marie-Lise Jonak and Baptiste Bouygues, exclusively launched at Barney's New York in Nov. 2018. The fragrance collection features seven unisex scents made from non-synthetic, fully-traceable ingredients such as patchouli from India, vanilla from Madagascar and rose from France. The ingredients were sourced from producers who have their own fields, are in a joint venture with the producer, or audit their primary supplier every year.

Kenneth Cole introduced the **Fragrances for All** series in three shared perfumes designed to be worn alone or layered. **Energy** features citrus and orange blossom notes, **Intensity** highlights a spicy blend of cardamom, tobacco leaf and coffee absolute while **Serenity** contains woody notes of white pepper, sandalwood and tonka bean. **Madewell** launched its first ever fragrance line in four scents: **Beau** (amber, woods), **Chambray** (floral, amber), **Indigo** (musk, woods) and **Sedona** (citrus, floral). The fragrances are formulated with cruelty free ingredients and are designed to be layered and mixed with other scents. UK **All Saints** fashion brand has debuted a trio of unisex perfumes. The **Incense City** is a blend of cypress, cedarwood and incense, while **Metal Wave** is a musky oriental with juniper

<sup>k</sup> <https://www.harpersbazaar.com/uk/beauty/fragrance/g38227/best-gender-neutral-fragrances/>

berry, magnolia and papyrus wood accords and **Sunset Riot** has woody with notes of pink pepper, orange flower and cedarwood.

**Andrea Maack**, the Icelandic visual artist and fragrance brand, added **Dark** to her fragrance range. **Dark** is a unisex fragrance described as a "heavily oxidized rose mixed with violets and leather" and includes apple, pink pepper, mandarin oil, Turkish rose oil, petitgrain, orange flower, Virginian cedar wood, ciste absolute and musk accords. **Functional Fragrance** by the Nue Co. was designed to lower cortisol levels. Designed "to calm the nervous system via olfactory triggers," the unisex scent contains green cardamom, iris, Palo Santo, violet and cedarwood.

## Enterprising Women

There is no shortage of fine fragrances. Although celebrity fragrances are declining, there are a few women moguls that have staying power and continue to grow their fragrance empires.

It is reported that Paris Hilton's fragrance sales exceeded \$2.5 billion<sup>l</sup>. Paris Hilton launched her 24<sup>th</sup> scent **Platinum Rush Paris Hilton For Women**, "which includes a bright and sophisticated scent that radiates with a sparkling blend of crisp Asian pear, ripe red apple, wet green florals and muguet flowers."

It is estimated that Britney Spears' fragrance empire earns her \$50 million a year<sup>m</sup>. **Rainbow Fantasy** by **Britney Spears** is the artist's 25<sup>th</sup> fragrance. Described as an oriental floral, the fragrance highlights cloudberry, pear leaf, finger lime, peony, water lily, jasmine, woods, crystal amber and cotton candy. Kim Kardashian West is a marketing guru and her **KKW Beauty** brand, which includes cosmetics and fragrances, has received an estimated \$100 million in revenue<sup>n</sup>. Kim Kardashian West was at it again with the addition of three new **KKW Hearts** fragrances that launched on Valentine's Day. The trio uses the same colorful, heart-shaped bottles as the original three scents. **Baby Girl** is described as "a sultry, yet flirtatious floral citrus fragrance that glimmers with a magnetic charm," with peony, jasmine, muguet, musk, vetiver and amber crystals. **Baddie** is "a dynamic, ultra-addictive and captivating floral fragrance," with palm leaves, wild rose, iris, geranium, heady woods, soft musks and golden amber, and **Wifey** is "a soft and sophisticated fragrance with notes of whipped caramel and creamy musks," with yuzu, pomelo, violet leaves, magnolia, freesia, mimosa.

<sup>l</sup> <https://www.townandcountrymag.com/society/money-and-power/a14531587/paris-hilton-net-worth/>

<sup>m</sup> <https://www.bbc.com/news/entertainment-arts-43211613>

<sup>n</sup> <https://www.forbes.com/sites/natalierobehmed/2018/07/11/why-kim-kardashian-went-is-worth-350-million/#7030d1524f7b>

**Editor's Note:** Please turn to page DE1 in the May Digital Magazine to read part 2.