

# Trend Report 2025

30<sup>th</sup> edition

**Welcome to the latest issue of our bi-monthly  
News Flash.**

Here we report on the new launches in global home care, home fragrance, personal care and fine fragrance. Enjoy insights on product trends and market drivers and explore updates on key launches that will help you stay on top of 'what's new' on shelf.





**Fragrance continues to bloom as beauty's fastest growing category. Even in the latest estimated sales across prestige beauty, fragrance is up 8%, while skin care and make-up are declining by 9% and 13% respectively (source: Daash Intelligence, year-on-year April 2025, week two). Price rises are partially responsible, but there is another key reason for its continued success.** Young Gen Z consumers have been driving a fresh burst of growth within fragrance, and the transformative effect this is having on the industry has become even more apparent over the past year. Whether it's the unprecedented rise of body sprays, the trend for 'smellmaxxing', that is seeing teenage boys splash out on luxury and niche scents, or even the boom for green fragrances that followed 'Brat' summer last year, category growth within fragrance is being driven by young consumers. The Fragrance Shop reported that it has seen 70% year-on-year growth in younger shoppers this year, while Piper Sandler said that teenage boys' annual spending on fragrances has grown by 44% y-o-y. And a Circana survey found that 55% of consumers aged 18-34 have changed their 'fragrance behaviour' over the past six months – the difference being that they now buy more body sprays. The sales figures speak for themselves: in 2024, the market for body sprays doubled in Europe, charting growth of 107% to a value of €265m, and with Sol de Janeiro topping the segment as the number one brand. This means that the body spray market is now worth almost half the market of women's edts, in terms of units. Beyond format, key trends such as premiumisation and stronger concentrations remain as potent as ever with intense and extrait versions continuing to appeal. In 2024, all three of the men's bestselling launches across Europe, YSL MYSLF Le Parfum, Jean Paul Gaultier Scandal Pour Homme Absolu and Boss The Scent Elixir, were intense versions. Long lasting fragrances with strong sillage remain highly sought after, and on TikTok, the current craze is to prolong the longevity and diffusion of one's scent trail. In response, many brands are introducing concentrated versions of their most iconic scents." The emotional connection, and in particular the ability of fragrance to impact mood, is another central point around which developments are evolving.

## Global fine fragrance market value and growth

Globally the market was worth \$72.6bn US dollars in 2024 and grew +8%, according to Euromonitor International. For Europe the fine fragrance value of the market in 2024 was €9.6bn with 7% growth. In the first two months of 2025 the market was valued at €2.4bn with 6% growth according to Circana.

## Global fragrance sales by category

In 2024, the premium market was ahead of mass and worth \$47.6bn compared to \$23.6bn. The premium market grew 9.1% and mass registered a growth of 6% according to Euromonitor International.

# Market Insight: Fragrance



## Top 3 launches in designer and premium masstige

In Europe in 2024 the top 3 woman's fragrances were; Rabanne Million Gold for Her, YSL Black Opium Over Red and Lacome's La Vie Est Belle L'Elixir, respectively. In men's fragrances; YSL Myself Le Parfum was top of the list followed by JPG Scandal Pour Homme Absolu and Boss The Scent Elixir.

*Source: Circana*

## USA & Spain lead value growth in prestige fragrance

The US market grew 12%, France grew 2%, Germany grew 8%, Italy grew 11%, Spain grew 12% and the UK grew 11% as consumers in the American and Western European countries continue to enjoy developing their fragrance wardrobes.





HOME CARE

## Cif Infinite + Clean All in One Sprays (UK, then Europe)

**Trend Notes:** As with the rest of the home care category, the all purpose cleaner aisle is getting its own 'glow up', in terms of function, innovation and also premium fragrance profiles.

Cif Infinite Clean is an all-in-one cleaner powered by probiotics and microbiome technology. The spray features 100% natural probiotics that remain dormant until they come into contact with dirt, then activate and keep cleaning for up to three days. It uses a "continuous mist" trigger for even application across hard and soft surfaces (e.g., worktops, electronics, sofas, carpets, pet beds) and includes odour protection.

**3 scents; Fresh Lavender & Eucalyptus, Clean Lime & Lemongrass and Sensitive Lotus and Mineral Salts.**







HOME CARE

# Lenor: Essences of Italy fabric conditioners

**Trend Notes:** Lenor has released the **Essenze d'Italia** collection inspired by the floral notes of six iconic Italian locations: Capri, Portofino, Siracusa, Amalfi, Florence and Polignano. Six scents that capture the soul of the most evocative places in the country, transforming the simple act of washing clothes into an unprecedented sensory experience; an ode to beauty, elegance and Italian identity.

- **Lenor Polignano:** fresh notes inspired by white lilac and calendula, for an enveloping and refreshing sensation.
- **Lenor Firenze:** an intense and sweet fragrance for a sensory journey that combines innovation and tradition, transforming every garment into a wearable experience. With Iris & Wisteria.
- **Lenor Amalfi:** A fragrance with fresh and citrus notes. Lemon and lily of the valley evoke the smells and flavors of Amalfi.
- **Lenor Siracusa:** a citrus, floral and sweet fragrance capable of transforming the simple act of washing clothes into an unprecedented sensorial experience! With orange & orange blossom.
- **Lenor Portofino:** From the combination of freesias and neroli comes an intense, fresh, sweet but also bitter fragrance, which smells of summer and evokes an iconic place like Portofino.
- **Lenor Capri:** Floral notes, gardenias and hyacinths with an inebriating scent are enclosed in the new Capri variant, for a freshness so enveloping that you can always carry it with you.







## HOME CARE

# Duck: Cleaning Gels & Fresh Discs

**Trend Notes:** Even the most basic of home care chores now have new Gen Z (or maybe AI) inspired fragrance formats – so the bathroom can always smell sensational!

### Mango-Verse

Notes of mango, magnolia and pineapple for an epic fragrance

### Virtual Violet

Notes of fresh sage, lavender and cedarwood





## Tallow + Ash (UK)

**Trend Notes:** That newborn scent, bottled. Indie home care brand Tallow + Ash has launched Little Miracle, a tender and nostalgic laundry shampoo and conditioner duo that aims to capture the soft, powdery essence of early newborn moments.

After 18 months of development, it delivers a fragrance rich in baby powder, soft skin, and freshly laundered blankets—featuring delicate notes of jasmine, rose, violet, vanilla, amber, and musk.

The thoughtful, eco-conscious formula is non-bio and baby-friendly, crafted with recyclable packaging and gentle ingredients that are safe for sensitive skin, fabrics, pets and waterways.







## HOME CARE

# Snif (USA) Midnight Grind

**Trend Notes:** This duo not only elevates the laundry experience with a cleverly themed scent, but also reinforces the brands lifestyle-centric positioning and its commitment to transforming routine chores into something sensory and fun.

Snif has unveiled Midnight Grind, a coffee-inspired addition to its laundry-care lineup, styled around the aroma of an espresso martini.

The Everything Wash detergent features a rich, indulgent fragrance blend of coffee, vanilla, chocolate, nutty accord, citrus zest, and smooth vodka, crafted to energize your laundry without the “espresso jitters.”

Complementing the detergent is a Liquid Scent Booster in the same scent. This booster is water-based and designed to deliver long-lasting fragrance that endures through the wash and dry cycles. It offers up to 25 extra washes per bottle and boosts aroma intensity.







HOME FRAGRANCE

# WoodWick (USA) Precious Metals collection

**Trend Notes:** This collection leans into an elevated, indulgent and more opulent fragrance experience, celebrating bringing fine fragrance ingredients into the home scent environment as consumers look for premium and sophisticated aromas.

**Shimmering Spice:** Saffron, a spice even more valuable than gold, offers its olfactive shimmer to this fragrance, with notes of bronzed leather and smoked woods deepening the blend. Top: Cardamom, Cinnamon, White Pepper | Mid: Saffron, Clove, Bronzed Leather | Base: Whiskey, Smoked Cedar, Sandalwood

**Sparkling Pomelo:** Scents of pink pepper, juicy lychee, and sparkling aldehydes bring this fragrance to life. Top: Pink Pepper, Lychee, Sparkling Aldehydes, Grapefruit | Mid: Hibiscus, Tart Berries, Gardenia | Base: Amber, Spun Sugar, Rosewater

**Marine Amber:** Scents of blue sea salt, cedarwood, and pearl crystals swirl together, tumbled smooth by years of rushing currents. Top: Aldehydes, Salty Sea Spray, Clementine | Mid: Jasmine, Waterlily, Blue Sea Salt | Base: Amber, Cedar, Pearl Crystals, Ocean Moss





## HOME FRAGRANCE

# Boy Smells Essentials Collections

**Trend Notes:** Inspired by Boy Smells' rich LGBTQ+ history, the Essentials Line pays homage to past Pride and limited-edition collections—both visually and olfactively.

**Herbaceous:** A green scent for feeling 10% more grounded than yesterday Notes of Bergamot, Wet Grass and Sage.

**Lavendare:** A fresh scent for soft launching inner peace. Notes: Lemon, Lavender and Vetiver

**So Vanilla:** A gourmand scent for your "just one more episode" era. Notes: Almond Blossom, Vanilla & Golden Amber.

**Hard Wood:** A woody scent for late nights, low lights and flirting. Notes: Black Pepper, Leather and Cedarwood





# Byredo: Coin Laundry

**Trend Notes:** The idea of 'clean' is ever evolving and with the fine fragrance market evolving the skin scent category with aldehydes, iris and musks we will be seeing a lot more of these scents enter other categories - as linen and cotton take a back seat in 'fresh, laundry like' fragrance creations.

Sunday afternoon at the laundromat, surrounded by the scents of soap and clean shirts pulled straight from the washing machine. A clean, sharp hit of aldehyde blends with lively pink pepper and delicate rose, resting on a soft floral trio and notes of musk and sandalwood.

**Top:** Aldehyde, Pink Pepper, White Rose

**Heart:** Neroli, Peony, Violet

**Base:** Blonde Woods, Musks, Sandalwood







HOME FRAGRANCE

# Brooklyn Candle Studio: Persimmon

**Trend Notes:** Italian summers and Californian summers are top inspirations for sun drenched scented escapes and ultrabright, ultra-sun-heated orange fruits are trending.

Evoking sun-drenched California summers, this fragrance was inspired by the memory of ripe, juicy persimmons plucked straight from a backyard tree—moments that recall carefree childhood vacations on the West Coast. It opens with a burst of bright citrus rind, unfolding into a juicy heart of pulpy persimmon and sweet quince. The scent lingers with a soft, sensual base of peach and musk, letting the stone fruit truly shine.







PERSONAL CARE

# Blake Brown (USA) Hair & Body Refresh Mists

**Trend Notes:** When Blake Lively launched her hair care range it was the highest-selling hair care line launch in Target history, selling \$16 million worth of products in the first week, according to Launchmetrics. Now the brand is transitioning into 2025's most popular format – hair and body mists. The brand says the “mists are designed to be the final step in your routine or as an any time-of-day fragrance boost. Keep it in your purse, in your drawer at work, in the gym, at school, wherever you want an instant pick me up of freshness, allure and yumminess”.

**Bergamot Woods:** Fresh citrus to energize, with just enough woodiness to keep you grounded. Bergamot Woods Refresh Mist opens with bergamot and mandarin, then gives way to delicate violet and lily of the valley. The cedarwood and tonka base adds a warm and comforting finish.

**Sandalwood Vanille:** A sophisticated take on classic vanilla. Sandalwood Vanille starts crisp with bergamot, then softens into jasmine, warm sandalwood, and creamy vanilla. Like your favourite cashmere sweater - soft, warm, and impossible to forget.

**Wild Nectar Santal:** Fresh, warm, and irresistible. Wild Nectar Santal starts bright with neroli and cardamom, then transitions into sweet nectar and lily of the valley. A scent as addictive as your favourite dessert.







PERSONAL CARE

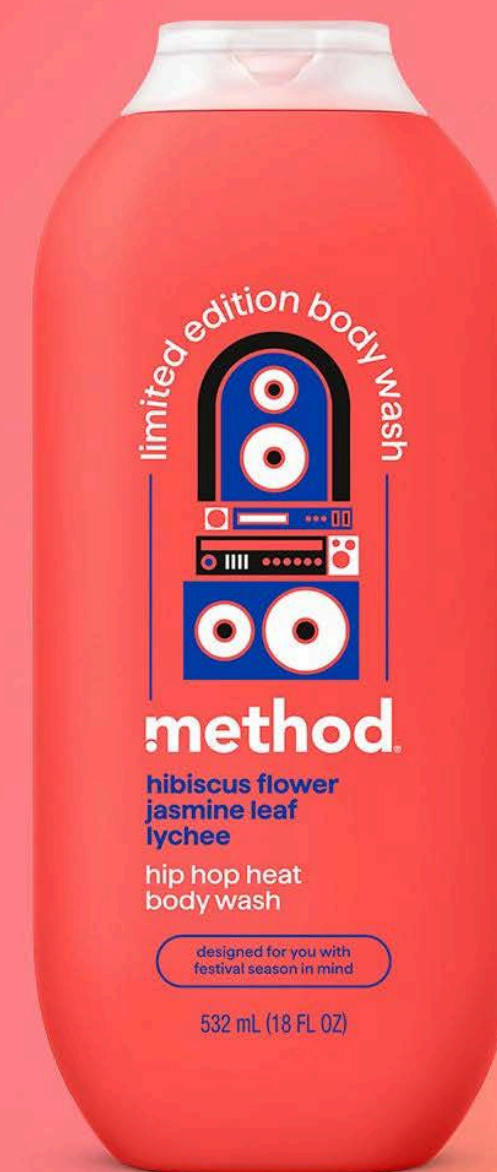
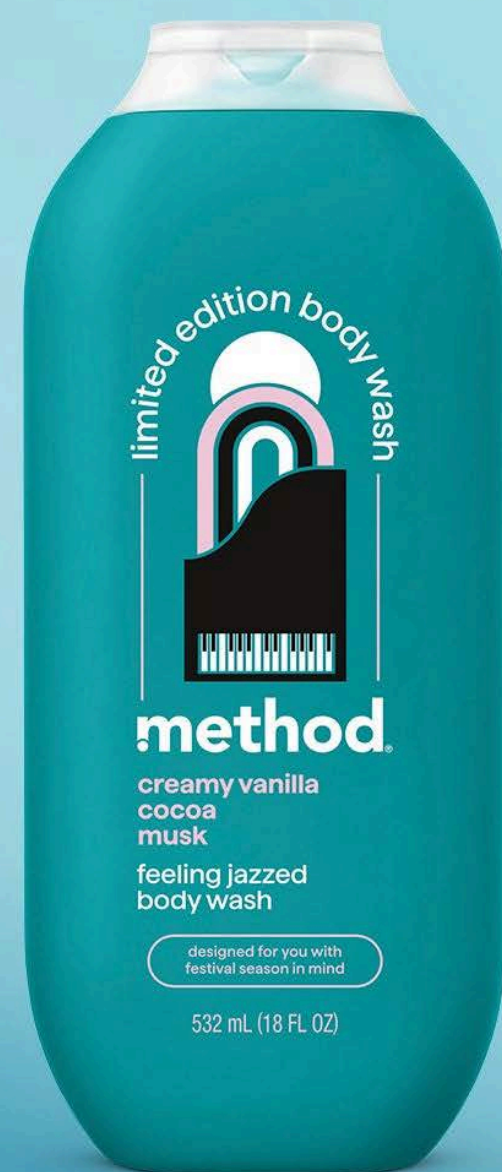
# Method: Festival Feels collection

**Trend Notes:** Limited editions are playing a large part in the fragrance launch strategy of many brands – especially as consumers recognise how scent can help them capture certain moments and occasions that help a season feel more memorable.

**Feeling Jazzed:** Inspired by festival season and jazz with notes of creamy vanilla, cocoa, and musk.

**Hip Hop Heat:** inspired by festival season and hip hop with notes of hibiscus, jasmine leaf, and lychee.

**Play That Funk:** Inspired by festival season and funk music with notes of orange, dragon fruit, and citrus.







## PERSONAL CARE

# Ellis Brooklyn: Milkshake Hair & Body Mists

**Trend Notes:** The Milkshake Hair and Body Mist Collection is inspired by summer scents. Some fragrance fans are drawn to sweet, creamy, milky scents but crave them in a light, refreshing form, and the limited-edition Ellis Brooklyn Milkshake collection delivers a trio of hair and body fragrance mists that strike that delicate balance without overwhelming the senses. While all three are fruity florals, each offers something refreshingly different. **Mango Milkshake** introduces its notes of mango mousse, vanilla and star jasmine with “a whipped and frozen effect.” **Banana Milkshake** goes gourmand with cozy tonka beans and boozy rum wood. **Lychee Milkshake** sparkles with sweet, nectar-like notes of cassis and raspberry leaves. Lightweight, ‘layerable’ hair and body mists are gaining traction as an affordable, easy-going entry point into the world of fragrance, offering a softer, more casual and customisable alternative to perfume.

**Banana Milkshake** is a decadent, rich, and tropical scent with top notes of musk melon, banana milk, and papaya; middle notes of apricot skin and vanilla orchid; and base notes of vanilla ice cream, rum wood, and tonka bean.

**Lychee Milkshake** is a sweet feminine scent with top notes of sparkling cassis, lychee milkshake, and pink pepper; middle notes of red freesia, violeta orchid, and raspberry leaves; and base notes of ambrettolide sugar cane and sandalwood.

**Mango Milkshake** is a cool and fruity take on sunny days with top notes of mango mousse, tangelo, and lemon; middle notes of coconut blossom, raw sugar cane, and beach freesia; and base notes of tonka bean, vanilla and upcycled musk.







## PERSONAL CARE

# New brand launch: bdy

**Trend Notes:** There's a new body care obsession coming to shelves – and it's anything but basic according to the brand. Meet bdy., “the bold new brand bridging the gap between your everyday shower staples and high-performance skincare”. Think indulgent formulas, real results, and major shelf appeal.

Created by Naterra, the powerhouse behind cult-favourite Tree Hut (America's No.1 Exfoliator), bdy. is the grown-up evolution fans have been waiting for. It's for the consumer who fell in love with Tree Hut scrubs – and now wants more: more sophistication, more skincare benefits, more self-care energy. Debuting with an initial seven-piece collection, the brand designed each product with proven skincare actives and nourishing ingredients to elevate the body care routine, without the high price tag. The collection includes Glow Body Buff, Foaming Oil Body Wash, Dual Phase Body Serum Mist, Overnight Body Serum, Weightless Body Lotion + Glow Body Buff mini and Dual Phase Body Serum Mist mini.

*bdy. is lightly scented with notes of bergamot, green tea, lotus blossom, and musk. Plus, with a commitment to omitting skin imperfections, bdy. formulas are developed to address common skin concerns, such as dryness, uneven tone, and texture*





## Bath & Body Works (USA) Off the Vine

**Trend Notes:** Bath & Body Works are bringing back one of social media's most viral trends 'tomato girl summer' with their new collection. It was Loewe's tomato candle that helped spark off the retro trend (we have seen tomato scents be popular before), but now we are seeing tomato scents and mushroom scents go super- mass in personal care launches.

What it smells like: a bright, earthy herb garden ripe for picking.

Fragrance notes: heirloom tomato, garden geranium and Mediterranean moss..







PERSONAL CARE

# Velvé skincare launches

**Trend Notes: Velvé:** Founded by tech executive and philanthropist Cynthia Sole, Velvé is a brand designed for the modern, multifaceted woman, rooted in the wisdom of African botanicals and elevated modern science. As a Nigerian American, Sole often looked to the time-honoured beauty rituals of her ancestors, such as African black soap, plantain peel, baobab oil, and more. Yet, despite their promise, Sole noticed that these powerful ingredients were often underutilized in mainstream formulations so is setting that right with a new brand launch.

The brand comes to market DTC with two hero products: Roasted Cacao Hydra-Soothe Gel Cleanser and Baobab & Rose Water Hydra-Dew Cream.







## MEN'S FRAGRANCES

# NEW LAUNCHES

**Versace Eau Fraiche Extreme** Lemon, Orange Blossom, Pink Pepper from Madagascar, Clary Sage from Provence, Diva Lavender, Geranium Bourbon, Virginia Cedarwood, Ambrox and Musk.

**Victor&Rolf Spicebomb Metallic Musk** Bergamot, Black Pepper, Elemi, Aldehydes, Cinnamon, Pepper, Lavandin, Ambrette Absolute (Guatemala), Cistus Absolute, Leather Accord and Musk.

**Yves Saint Laurent MYSLF L'Absolu** Ginger, Bergamot, Cardamom; Orange Blossom, Floral Notes and Patchouli.





**GANT**  
PREPPY ROSE  
THE NEW FRAGRANCE FOR WOMEN



## WOMEN'S FRAGRANCES

# NEW LAUNCHES

**Gant Preppy Rose** Crispy Pear, Tangy Grapefruit, Fresh Roses, Jasmine, Neroli, Soft Cedarwood, Sandalwood and an Ocean Wave accord

**ANNA SUI Sundae Neon Twist** Coral Hibiscus, Grapefruit, and Bergamot, Guava Ice cream, Jasmine, and Neroli, Musk, Amber and Blond Woods

**Jean Paul Gaultier Divine Elixir** Salt, Tuberose and Tonka Bean





## Premium, Indie + Niche Fragrances

### Goldfield & Banks Pacific Rock Flower

Goldfield & Banks introduces the Pacific Rock Flower eau de parfum, a scent inspired by an oceanic paradise. Salty notes and coastal white flowers create a rich aroma reminiscent of the sunlit warmth of the ocean and the flora that grows beside it, capturing an ethereal beauty with every spritz.

***Top Notes: Lemon, Eucalyptus, Australian Coastal Tea Tree, Sea Salt***

***Middle Notes: Cocowax, Coral Flower, Mimosa, Tuberose***

***Base Notes: Moss, Cedar Wood, Patchouli, Sandalwood Australia***







# Premium, Indie + Niche Fragrances

## Maison Margiela Replica Ideal One

Maison Margiela expands its evocative REPLICA fragrance collection with a new addition called Replica Ideal One. Belonging to the line of "Reproduction of Familiar Fantasies," this scent wants to dive into the realm of sensual connection and emotional intimacy, reimagining what it means to encounter your "perfect match" in fragrant form.

*Created as the olfactory embodiment of human chemistry, Replica Ideal One is a fragrance that depicts the intimate electricity between two people. The Maison describes it as a "carnal and sensual journey" — an experience intensified by the Skin Fusion Accord, a unique composition that blends human warmth with high-tech precision. This abstract note lies at the heart of Ideal One, designed to mimic the tactile impression of bare skin meeting bare skin — a tactile dance rendered in scent.*

**TOP:** elemi essence, orange essence, Calabrian bergamot

**HEART:** orange blossom, lavender heart

**BASE:** oud accord (cypriol – ambery woods – vanilla infusion), guaiac wood essence, styrax, musks







# Premium, Indie + Niche Fragrances

## Nette Lemon Puff

Nette is an American fragrance brand that creates scents inspired by modern protagonists—imagined characters brought to life through thoughtful, story-driven compositions. Each fragrance is a character study designed to transport wearers into rich, emotional worlds while also encouraging a deeper connection to themselves. Their new fragrance Lemon Puff is rooted in joyful nostalgia and designed to elevate the mood. This luminous Eau de Parfum is a delicious embrace of citrus, creamy sweetness, and cozy comfort the fragrance was born from a creative brief infused with whimsy: sunlit lemon groves, toasted meringue, the comfort of a Parisian patisserie, and even a subtle nod to the beloved tale of Puff the Magic Dragon. The result is a fragrance that feels as innocent as first love and as comforting as a childhood memory.

**Top notes:** bergamot, lemon

**Heart:** jasmine sambac, vanilla, almond, meringue

**Base:** sandalwood





**To brainstorm what these launches could mean to you get in touch with our team:**

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Holland Aromatics is a modern, internationally oriented Dutch fragrance company focused exclusively on the development and the production of fragrances for each purpose.

Since its founding in 1984 Holland Aromatics has grown into an international fragrance company with sales in more than 60 countries. The key to this remarkable success is simple: passion.

