

Trend Report 2025

31st 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.



Market Insight: Sun Care

Sunscreen has undergone a major transformation, evolving from a purely functional product into a trending beauty category. Once seen only as protection against skin cancer, SPF is now expected to deliver skincare and cosmetic benefits while fitting seamlessly into daily routines. This shift is being driven by consumer demand for advanced, multifunctional products that feel good on the skin and offer inclusivity across all tones. Brands are responding with innovations such as invisible finishes, lighter textures, and hybrid formats that combine sun protection with skincare or makeup. Market data shows strong growth, with younger consumers especially prioritizing prevention over correction. Among millennials, 78% prefer beauty products containing SPF, reflecting a broader cultural focus on longevity, skin health, and sustainable living.

Five major trends are shaping the category in 2025. **Gen Alpha** is emerging as a new consumer group, spurring launches tailored to their needs. **Invisible sunscreens** are replacing heavy, white-cast formulas with weightless alternatives. **SPF lip oils** are merging shine, skincare, and sun protection in a trending format. **Tinted sunscreens** are gaining popularity, with demand growing nearly 87% year-on-year as consumers seek simplified, protective beauty solutions. Finally, **reef safe sun care** is becoming a priority, as environmentally conscious shoppers push for biodegradable formulas and plastic-free packaging. As sun care continues to align with beauty, wellness, and sustainability, brands are capitalizing on its high growth potential. What was once an afterthought is now at the heart of daily beauty regimes, reshaping consumer expectations worldwide.



Global market value and growth

In 2024, the global sun care market saw strong growth across key regions. The US led in market value at \$3.6bn, with a growth rate of +4.9%, while China followed at \$2.5bn, growing more modestly at +1.3%. Brazil recorded \$1.1bn in value, experiencing notable growth of +6.4%. The UK reached \$721.3m with +5.5% growth, and South Korea stood out as the fastest-growing market, rising +9.5% to \$710.8m. These figures highlight both the scale and rising momentum of sun care worldwide, with South Korea emerging as a key driver of category expansion

Global sun care sales by category

In 2024, sun protection dominated global sun care sales at \$13.4bn, growing +5.4%. The aftersun category reached \$838.4m with a more modest increase of +3.8%, while self-tanning rose to \$817.1m, expanding by +4.0%. Notably, baby and child sun care showed the fastest growth rate at +6.6%, totalling \$1.2bn. These figures reflect strong consumer focus on prevention and family care, alongside steady demand for aftersun and tanning products.

Consumer attitudes in sun care

Searches for “reef safe SPF” rose 86% since 2024, while product launches labelled reef safe increased 150% in the past year (Trendalytics). Demand for tinted SPF grew 86.9% year-over-year across digital platforms (Spate). 78% of millennials in Europe prefer beauty products containing SPF, compared to 65% across all age groups (Circana)

P&G Unstopables: Unlimited Collection

Trend Notes: Unstopables announces the launch of the Unlimited Collection, a new line of in-wash laundry scent boosters that, according to the brand, “make fine fragrance accessible to everyone, everywhere”. Inspired by the craftsmanship of prestige perfumes, the Unstopables Unlimited Collection redefines the scent booster category with bold, long-lasting aromas designed to luxe up everyday laundry.

The collection debuts with three elevated fragrances that evoke indulgence and sophistication. Crafted to stand apart from typical fresh scents, each delivers a statement-making experience.

Unstopables Unlimited N.09: A crisp, aromatic blend that invigorates the senses, transporting to the heart of an evergreen forest. Eucalyptus, pine, and cedarwood intertwine to create a woody, minty essence that's both refreshing and grounding. Confident, with depth and fresh clarity, leaving an unforgettable trail of natural allure.

Unstopables Unlimited N.26: A floral woody fragrance that envelops laundry in an embrace of timeless elegance. Delicate rose, sweet honey, and earthy oakmoss combine to create a warm, inviting, and utterly captivating scent. Romantic and modern, it offers unexpected warmth that lingers.

Unstopables Unlimited N.37: A luscious delight, this fruity creamy fragrance offers a vibrant aroma. Bright bergamot, powdery orris, and rich vetiver intertwine to deliver a luxurious, subtly sweet, and endlessly intriguing scent experience. Luminous and smooth, with a refined sensuality.



Laundry Sauce (USA): Mojave Peach

Trend Notes: Laundry Sauce wanted to craft a fragrance that captured the essence of the desert at dusk - when the heat softens and the air hums, as spiced winds whisper through sun-drenched canyons. That vision led to the limited-edition **Mojave Peach**: the brands juiciest fragrance yet.

“A hypnotic blend of ripe peach and warm desert air, with notes of ripe peach, spicy cinnamon, creamy ylang ylang, star anise, Mojave peach, geranium, labdanum, sweet vanilla and soft sandalwood, your laundry will carry this sultry, succulent scent from sunrise to sunset”.

“There’s a long tradition in perfumery of using peach as a very luxurious ingredient,” explains the brands principal perfumer. “It started a hundred years ago with Guerlain’s Mitsouko.” Peach brings a rare mix of sensuality, softness, and brightness that plays well with other notes. We decided it was time to bring that timeless allure into the laundry room, with an unexpected, desert-inspired twist.





HOME FRAGRANCE

Zara Home

Trend Notes: The scents of high summer – cool down with peppermint, remember those lazy summer days with coconut and be transported to a fruity paradise with lychee. This trio is perfect to capture the end of the summer moments and keep them alive.

Lime & Peppermint: Top notes: Lime, Lemon & Peppermint | Heart notes: Magnolia & Violet | Base notes: Sweet, Musk & Cedar

Coconut & Pineapple: Top notes: Coconut, Pina Colada and Almond | Heart notes: Tropical Fruits, Jasmine and Violet | Base notes: Tonka, Vanilla and Amber

Lychee & Lemon: Top notes: Lychee, Italian Lemon and Apple | Heart notes: Cherry blossom and Rose | Base notes: Amber, Sandalwood and Musk





HOME FRAGRANCE

Sainsbury's x Habitat (UK): Autumn 2025

Trend Notes: The warming scents of late summer and early autumn – this collection blends freshness with warmth, grounding naturals with soft florals - evoking calm, comfort, and quiet luxury. Airy florals, cozy woods, and layered textures align with today's demand for elevated, wellness-inspired fragrances.

Fig Leaf & Amber: Take the green snap of fig leaf and green tea softened by warm, golden amber. Add a gentle swirl of jasmine and violet and the scent turns quietly floral. Fresh, smooth and softly layered with sandalwood.

Peony & White Lily: Clean, floral and uplifting. Features the gentle sweetness of peony, white lily and rose, with a touch of fresh apple. Calm, bright and beautifully balanced with a woody and musky finish.

Honey & Sandalwood: Imagine the aroma of wild sweet honey mingled with exotic sandalwood. Bright sparks of bergamot and rhubarb add a refreshing twist. The rich fragrances intertwine to create an enticing scent that perfumes the air and soothes the senses with coconut husk, cashmere, white cedar, patchouli and vanilla bean.





HOME FRAGRANCE

Brooklyn Candle Studio: Mimosa Pear

Trend Notes: This seasonal candle captures late-summer's calm with crisp pear, soft mimosa, and golden honey over a smooth white musk base. Light, airy, and subtly sweet, it reflects the trend toward refreshing yet comforting scents that transition seamlessly between seasons, evoking warmth, balance, and a gentle sense of renewal.

Crisp, watery notes of bosc pear mingle with a delicate floralcy of golden mimosa flowers blended with sweet honey over a base of white musk. The perfect calming blend to burn as you while away the final languid Summer days of the season.

TOP NOTES: Bosc Pear

MIDDLE NOTES: Golden Mimosa, Honey

BASE NOTES: White Musk



HOME FRAGRANCE

Yankee Candle: Halloween Collection 2025

Trend Notes: Storytelling fragrances that blend nostalgia, mystery, and seasonal indulgence. Moody notes like myrrh, patchouli, and cedarwood meet playful gourmand touches of marshmallow, cocoa, and vanilla. This balance of spooky sophistication and cosy comfort aligns perfectly with consumers' love for immersive, experiential scents.

Phantom Bookshop: What lurks inside the pages of this creaky old bookshop? Scents of orange, rose, and vanilla parchment are written together to create a spine-tingling mystery.

Top notes: Orange, Rose, Grapefruit, Aged Ink. Middle notes: Cinnamon Leaves, Myrrh, Olibanum, Hedione. Base notes: Patchouli, Vanilla Parchment, Guaiac wood, Amber

Apothecary Potions: The veil between worlds is pulled away as this mystical fragrance surrounds you. Blackberry notes intertwine with black tea and cedarwood aromas to create a moody and intriguing apothecary potion.

Top notes: Raspberry, Strawberry, Green Herbs. Middle notes: Blackberry, Black Tea, Jasmine. Base notes: Praline, Cedarwood.

Spooky Sweets: Ghosts made of fluffy white marshmallow haunt this sweets shop concoction. Notes of black vanilla and dark foamed amber add spookiness to the scent.

Top notes: Juniper Berry, Clove, Marshmallow Ghosts. Middle notes: Cocoa, Black Vanilla, Maple Sugar. Base notes: Cashmere, Foamed Amber, Hazelnut.

Mystic Toys: A mystical toy store with wares that are just a bit strange and a little too real — notes of clove bud, violet petals, and vanilla bean build a complex floral scent you'll want to play with.

Top notes: Clove Bud, Beeswax. Middle notes: Violet Petals, Dusty Peony, Aged Linen. Base notes: Patchouli, Vanilla Bean, Sandalwood.



HOME FRAGRANCE

Homesick Candles (USA)

Trend Notes: This new collection celebrates warmth, comfort, and togetherness. From festive gatherings with wine and flowers to nostalgic campfires, cozy cider, and market-fresh honey, each scent evokes cherished moments. Layered with fruits, spices, and comforting sweetness, the collection captures the essence of hospitality, indulgence, and seasonal joy.

Host With The Most: The warmest of welcomes. A table overflowing with fresh flowers and good wine. The art of the perfect party.

Pomegranate, Wine, Rose, Black Currant, Cedar

Burnt Marshmallow: Crackling campfire flames. Pillow-soft vanilla marshmallow. Caramelized sugar bubbling to a crisp.

Marshmallow, Vanilla, Campfire

Hot Cider: Cider mulled with warming spices. Sweet steam swirling into cold autumn air. Whipped cream with a touch of vanilla.

Red Apple, Cardamom, Cinnamon, Vanilla

Local Honey: Warm your hands on a steamy London Fog as the sweet scent of local honey spills through rows of market stalls. Savor the perfect Sunday.

London Fog, Almond, Honey, Vanilla Amber





PERSONAL CARE

Cécred Protection Collection (USA)

Trend Notes: Beyoncé’s Cécred Protection Collection addresses the growing demand for scalp health, protective styling care, and ritual-driven beauty. With science-backed formulas, inclusive focus on textured hair, and luxurious sensory details, it reflects consumer desire for performance, self-care, and cultural authenticity. Extensions and protective styles are looked after from install to take down with this new collection, according to the brand.

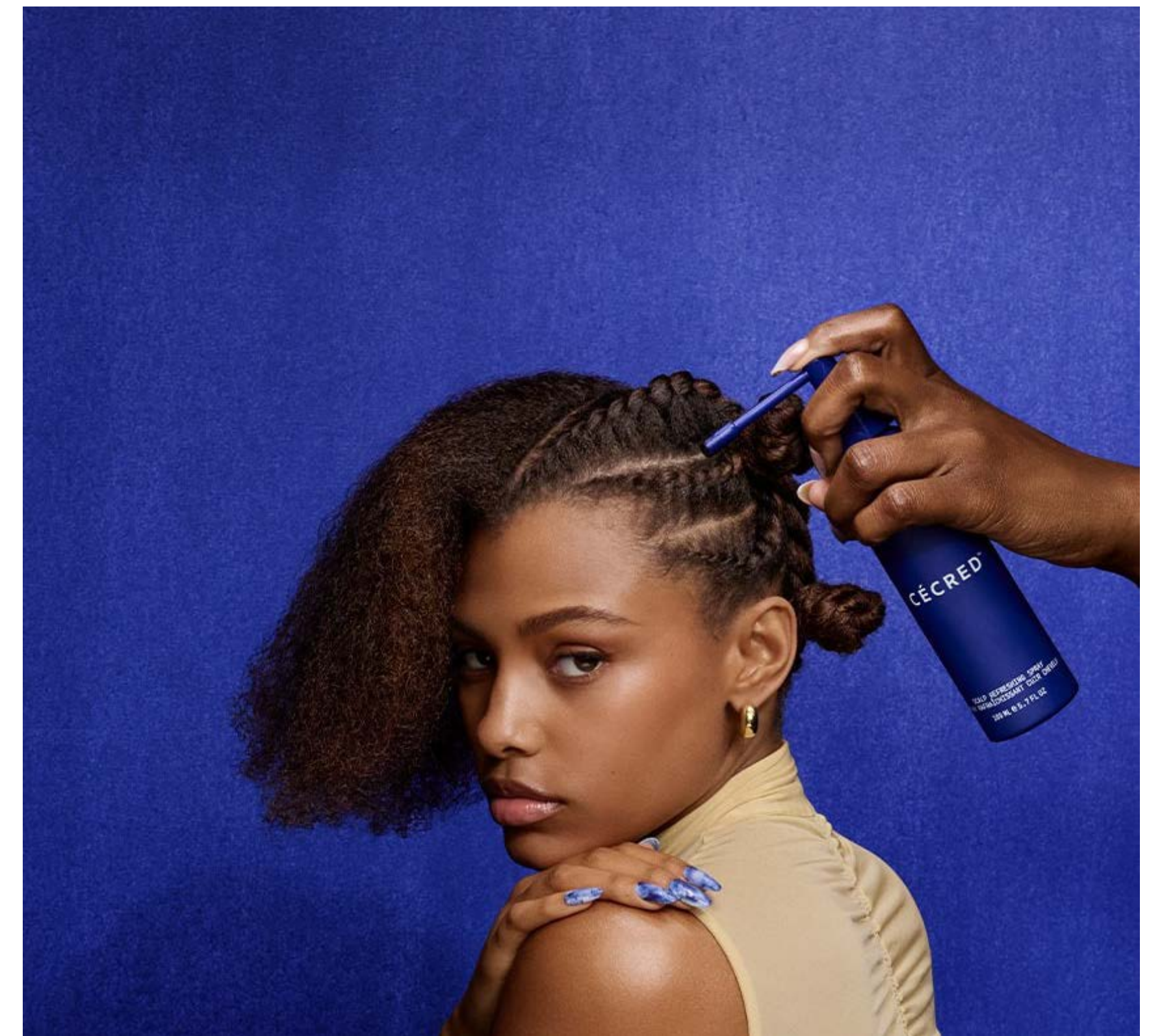
Featuring five hair care products, as well as a Oil Warming Applicator, the range is powered by PhytoFerment – a concentrated blend of bioactive Co2 extracts that works to soothe and nourish the scalp and hair while clearing impurities. The collection is comprised of Detangling Spray, Detoxifying Shampoo, Hair & Scalp Balm, Oil Ritual and Scalp Refreshing Spray. All are packaged in Lapis Blue, inspired by the Lapis Lazuli stone, "which was historically used to depict hair in ancient art and represents royalty, honour and wisdom.

As for scent, the “Protection Collection” is coming through with a brand new signature fragrance “Nocturne Spice” — which is described as a blend of pink pepper, vanilla, cardamom spice, tonka bean and oud. It’s a scent that feels luxurious and sensory—spiced, slightly sweet, and warmly grounded.

NEW

PROTECTION COLLECTION

Healthy hair from install to take down, for extensions and protective styles.





HOME FRAGRANCE

Ouai (USA): Deodorants

Trend Notes: The luxury deodorant market thrives as consumers seek clean, effective, and fragrance-driven alternatives to mass products. This collection embodies that shift: Cape Town refreshes with earthy greens, Melrose Place elevates with romantic florals and woods, and St. Barts transports with tropical vibrance - functional yet indulgent, aligning with wellness and luxury lifestyle trends.

Cape Town: This is an earthy, fresh scent—with a green and invigorating profile: Top Notes: Ginger, basil, and spearmint, Middle Notes: Tomato leaves and green fig Base Notes: Ambroxan and wet grass described as smelling like you've "just stepped out of the shower"—bright, cooling, and fresh.

Melrose Place. This fragrance evokes the vibe of LA in full bloom—a velvety-rich rose scent. Top Notes: Champagne, pink peppercorn, berry, and lychee, Middle (Heart) Notes: Peony, rose, freesia, jasmine, and bergamot. Base Notes: Amber, sandalwood, white musk, and cedarwood. Melrose Place is a versatile companion, airy and soft, with faint floral notes that meld with the woodier elements seamlessly... as it kisses my skin, the woods dissolve to make way for rose and lychee to emerge.”

St. Barts: A tropical beach escape in a bottle. The scent is vibrant, exotic, and evocative: Top Notes: Dragon fruit, orange oil (or orange blossom), and an ocean breeze accord. Middle Notes: Orange blossom, sampaguita, and tuberose Base Notes: Baltic amber and musk. A “breezy coconut & white floral with sweet orange elements,” conjuring “summer in a bottle,” or even a “classy piña colada by the ocean”



Tatcha: The Longevity Serum

Trend Notes: Tatcha's Longevity Serum is a hybrid gel-oil treatment developed over seven years. Inspired by the founder Vicky Tsai's journey to Okinawa—an island famed for its long-lived residents and healing traditions—it channels the essence of "nuchi-gusui" ("life medicine") into a skincare product. This serum marks a philosophical shift: from reactive anti-aging to proactive longevity. By targeting cellular health at the root of aging, Tatcha invites users to nurture skin for long-term vitality - not just surface results. The product bridges beauty, tradition, and scientific innovation in a meaningful way.

The serum features a proprietary Okinawa Cellescence Complex, formulated in Tatcha's Tokyo research lab. It harnesses:

- Shikuwasa lime: evens skin tone
- Noni juice: strengthens the skin barrier
- Shell ginger: gently exfoliates

These botanicals collectively work to reduce cellular senescence—often referred to as "zombie cells"—which drive chronic inflammation and aging. It also includes bio-active lipids to combat oxidative stress and support collagen and elastin, alongside a Pro-AHA prebiotic to promote natural exfoliation and beneficial microbiome balance.

Tatcha frames the serum not just as skincare—but as a sensorial and emotional ritual. The gel-to-oil texture melts into skin, and the fragrance evokes Okinawa's coastline and forests. Top notes of citrus and ocean air shift into deeper, woody undertones—crafted to transport and nourish both skin and spirit



Shirin (Germany): Milky Mango Matcha Latte Kiss

Trend Notes: Shirin Beauty, the brand by German rapper and influencer Shirin David, just dropped a limited edition called Milky Mango Matcha Latte Kiss. This collection plays on the delicious fusion of juicy mango and creamy matcha latte - think fruity and refreshing body care with a chill café twist - and deep nourishment without feeling 'heavy' on the skin.

The brand says; this 4-piece body care set is crafted to deliver that "just got back from vacation" glow with a Shower Gel, Body Scrub, Body Butter and Body Oil.

Scent profile: A delightful combo of tropical mango and the creamy, soothing drift of matcha latte - fruity yet cozy.



PERSONAL CARE

Balea: Seasonal Face Masks

Trend Notes: Delivering skin care benefits and a scent experience that according to the brand deliver “irresistible moments of well-being”, as single use masks continue their popularity in self care moments and skin care routines. The global disposable face mask market is expected to climb from approximately US \$55.5 billion in 2025 to \$109.5 billion by 2032, with a robust 10.2 % CAGR.

The **Matcha Latte sheet mask** combines nourishing benefits with an indulgent fragrance experience. Green tea extract gently soothes the skin, giving it a fresh, revitalized appearance.

The **Cinnamon Bun sheet mask** with almond oil, provides a soothing skincare experience and supports the skin's hydration. The enticing scent of freshly baked cinnamon rolls makes each application a sweet treat.

The **Hot Chocolate sheet mask** pampers the skin with an intensive care formula of hyaluronic acid, cocoa butter, and vanilla extract. The seductive scent of cocoa and vanilla makes application a truly special experience. This sheet mask ensures a fresher-looking complexion and a well-cared-for skin feeling.

The **Blueberry Muffin Sheet Mask** provides soothing care for the skin with blueberry extract and cocoa butter, providing a moment of relaxation. An enticing scent of chocolate and blueberries. For a fresher, more even complexion and an all-around pampered feeling



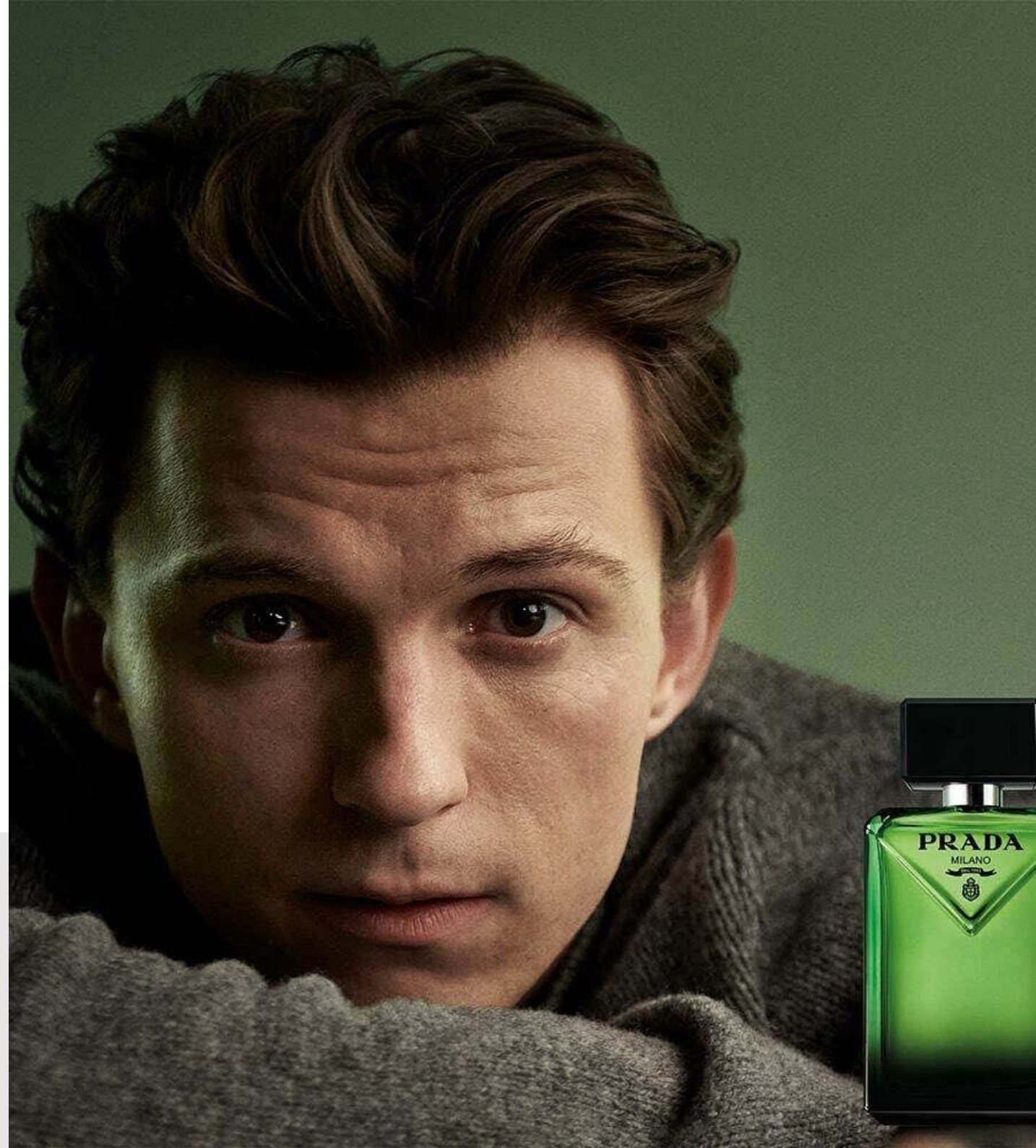
OBVIOUS launch liquid soaps

Trend Notes: With the launch of its liquid soap collection, Obvious Parfums turns “a simple care ritual into a sensory escape”. The brand is launching MILK & MATCHA, UNE PISTACHE, UN MUSC, UN BOIS, UNE FLEUR D'ORANGER and UNE FIGUE. Its 2 most viral scents; MILK & MATCHA and UNE PISTACHE are gaining lots of attention on social media.

MILK & MATCHA: Like a rich and captivating matcha latte, our liquid soap extends the experience of its namesake fragrance — a delicate balance between the fresh bitterness of matcha and the creamy sweetness of vanilla and orange blossom. A velvety nectar for everyday optimists.

UNE PISTACHE: Obvious Parfums translates its iconic Une Pistache fragrance as a milky veil with almondy and woody undertones. Close your eyes and drift away to Persian lands, wandering through markets where orange blossom and pistachios mingle with the sweet scent of marzipan. The body melts into a luscious lather, straight from the streets of Tripoli — a pistachio both bold, dense, and utterly intoxicating.





MEN'S FRAGRANCES

NEW LAUNCHES



Prada Paradigme Peru Balm, Benzoin Resin, Guaiac Wood, Green Bourbon Geranium, Rosy Facets, Calabrian Bergamot Heart and Airy Musks.

John Varvatos Artisan Forest Tangelo, Fig Leaf, Galbanum, Fresh Rosemary, Smyrna Fig, Violet Leaf, Buchu, Wormwood, Cedar, Patchouli Vetiver and Embermax.

Hugo Boss Bottled Beyond Ginger, Leather and Woody notes.



WOMEN'S FRAGRANCES

NEW LAUNCHES

Dior Miss Dior Essence Blackberry Jam, Elderflower Accord, Jasmine Sambac, Jasmine Absolute, Oakwood and Woody Accords.

Ôrabella Eternal Roots Lychee, Bergamot, Pink Pepper, Raspberry Blossom, Pink Sugar, Suede, Labdanum, Papyrus, Vetiver, Birch Smoke and Patchouli.

Juicy Couture Just Moi Cacao Blossom, Magnolia, Plum Nectar, Crème de Cacao, Vanilla Orchid, Jasmine Sambac, Cacao Bean, Vanilla-Ambrox, Sandalwood and Warm Musk.



Premium, Indie + Niche Fragrances

Ellis Brooklyn Queens Caramel

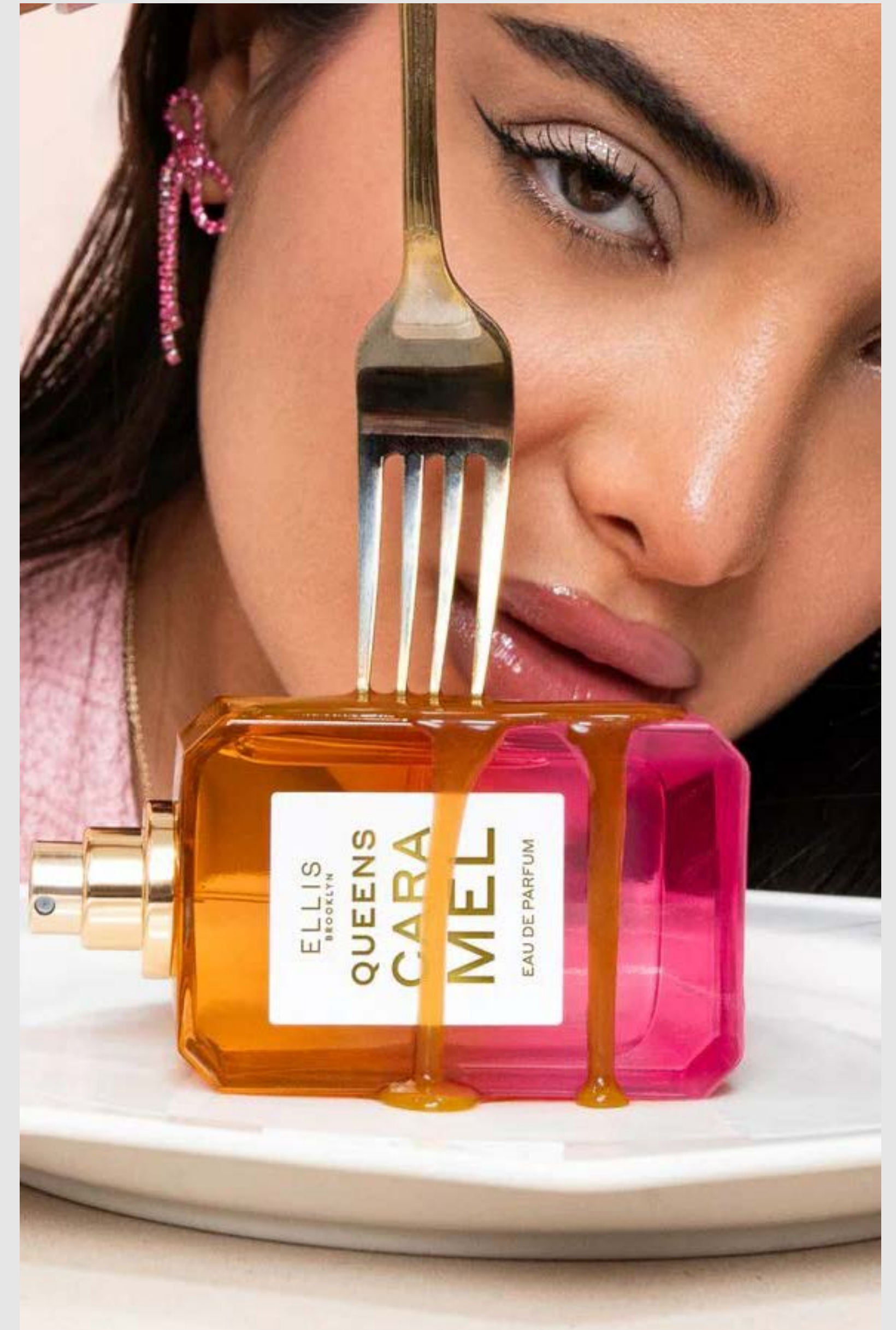
Ellis Brooklyn founder Bee Shapiro has shown a growing love for the gourmand perfume family ever since her first food-centered fragrance, Sweet (pear and marshmallow), was released in 2020. In 2022, Vanilla Milk followed (vanilla and milk); in 2023, Apple Love (apple, peach, sugar, vanilla); in 2024, a line of body mists with gourmand notes (peaches, marshmallows); and in early 2025, a Milkshake line and the summery sweet Guava Granita.

"An olfactive treat, QUEENS CARAMEL is an ode to delectable decadence. With notes of caramel, maple sugar, white chocolate, pink salt, and milky musks, QUEENS CARAMEL is the kind of royal treat you deserve. "How do you make gourmand feel elevated and expensive? There's this delicious, immediately yummy aspect of QUEENS CARAMEL, but it's the prettiness and refined feel of the scent that I fall in love with every time I wear it." — Bee Shapiro, Founder.

Top: Caramel, Maple Sugar, Wild Honey, Pink Salt

Mid: Whipped Coconut, Vanilla Orchid, White Chocolate, Jasmine

Dry: Vanilla Bourbon, Amber Woods, Tonka Bean, Milky Musks





Premium, Indie + Niche Fragrances

Creed Oud Zarian

Oud Zarian is the brand's latest offering, which will launch this coming Autumn in time for cooler weather and shopping lists for the upcoming holidays.

The basic chord of Oud Zarian by Creed is constructed with Jalali Oud, while the interpretation is a spicy, piquant take on the oriental genre with a sweetish base of oud. This chord is vanillic and rich with ambery tones, anchored by resinous shades. It sounds like something that will become popular with ease.

top: Bergamot, Ginger, Spices

heart: Rose Centifolia, Frankincense

base: Jalali aged oud, Patchouli, Tonka Bean, Sandalwood, Myrrh, Liquorice





Premium, Indie + Niche Fragrances

Balmain Cuir Élysées

Balmain has launched Cuir Élysées, the latest addition to its Les Éternels de Balmain collection. Les Éternels de Balmain is a collection of eaux de parfum focused on identity, personal evolution, and the house's heritage.

Described as a fruity leather fragrance, Cuir Élysées combines classic leather with vibrant fruit and floral notes, offering a contemporary interpretation of luxury and texture. According to Balmain, the scent reflects the house's approach to elegance and strength — rich materials contrasted with modern detailing. The leather forms the core of the fragrance, softened by the fruity sweetness of raspberry and the mild spice of pink pepper. The heart introduces a light floral layer through petalia (a synthetic peony note) and green jasmine. Sandalwood rounds out the composition with a creamy, slightly woody finish.

Top: Raspberry, Baie Rose

Heart: Petalia, Green Jasmine

Base: Leather, Sandalwood





Premium, Indie + Niche Fragrances

BYREDO Alto Astral

Alto Astral draws its name from a Brazilian Portuguese expression meaning “high spirits” or “good vibes.” Byredo intended the fragrance to evoke joy, optimism, and uplifting energy—embodying the essence of Brazilian culture, from samba rhythms to sunlit streets.

This fragrance marks a luminous new chapter in Byredo’s olfactory story. It was created to be familiar yet dynamic—something that resonates with emotion and cultural identity.

“Alto Astral from BYREDO opens with a vibrant interplay of aldehydes and creamy coconut—an effervescent yet soft introduction that captivates immediately. At its heart, jasmine petals entwine with airy incense and milky musk, forming an abstract warmth that seems to hover just above the skin. The base unveils a sensual trail of sandalwood, cashmere wood, and salted amber, offering texture, depth, and lingering luminosity”.





Premium, Indie + Niche Fragrances

Nest Crème de Clementine

American niche brand Nest has released a summer unisex fragrance, Crème de Clementine , which combines citrus and gourmand notes. It is inspired by the frozen dessert Creamsicle, which is vanilla ice cream covered in frozen fruit juice - usually orange.

"Transport yourself to carefree days with this dreamy, delightful scent that evokes the spirit of a never-ending summer day filled with warmth and joy. Like a bite of orange ice cream on a sunny day, Crème de Clementine brings blissful relaxation,"

The composition of the Crème de Clementine fragrance combines notes of fresh citron and clementine peel with hints of vanilla and custard, enhanced by nuances of light woods.



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

Phone: +31 (0) 36 - 536 33 35

E-mail: customercare@hollandaromatics.nl

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.

