

Trend Report 2025

32nd 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: Hair Care

The hair care category in 2025 has evolved into a wellness-driven industry that merges efficacy, emotional uplift, and sensorial experience. Once focused purely on cleansing and styling, hair care now embraces self-care and holistic wellbeing, positioning scalp and hair health as extensions of mental and emotional balance.

According to Circana, prestige hair serums grew 40% across Europe in early 2025, while masks grew +32% and oils grew +17% - driven by the ongoing ‘skinification’ trend, where hair products borrow from skincare science to deliver targeted, results-driven care.

Five major trends are defining the landscape.

Hair growth dominates, fuelled by celebrity-led brands and science-backed innovations promising thicker, stronger strands. **Playful branding** - seen in campaigns from Paul Mitchell (with Paris Hilton) and TRESemmé - brings optimism and escapism to the category, resonating with Gen Z consumers seeking joy and self-expression. **Waterless hair care** is pioneering sustainability, with concentrated, refillable, and foam-based innovations reducing waste and packaging. **Edge care** is growing rapidly, with data from Spate showing a 262% increase in concern for thinning edges, inspiring launches from Beyoncé’s Cécred and Rihanna’s Fenty Hair. Finally, **onion shampoo** has exploded in popularity, with a 1,000% rise in searches, as TikTok spotlights its Ayurvedic hair strengthening benefits. As consumers enter their “ritual era,” hair care is transcending function - becoming an emotional, sensory and sustainable expression of self-care and wellness.



Scalp Care Demand: +19% Growth in Leave-in Treatments

Scalp care is becoming a core focus, with leave-in scalp treatments rising 19% in early 2025 according to Circana. Consumers increasingly recognise the scalp as the foundation of hair health, driving innovation in exfoliating serums, balancing oils, and probiotic-based formulas that mirror advanced skincare routines.

Prestige sales growth across Europe

Overall, the European hair care market experienced a 16% increase in sales compared to the same period in 2024. Among the major countries, France led with a remarkable 27% growth, followed by Spain with 23% growth. The UK saw a solid 15% rise, while Italy recorded 14% and Germany grew by 11%. These figures, sourced from Circana, reflect data for January to June 2025 versus the same period in 2024.

Global value & growth

The shampoo sector leads the market with a value of \$33.26 billion, showing a 4.3% increase. Conditioners and treatments follow at \$13.3 billion, also growing by 4.3%. Colourants are valued at \$26.9 billion, up 2.1%, while styling agents total \$9.06 billion with a 5.1% rise. The perms and relaxants category declined by 4.2%, reaching \$1.05 billion. Salon professional hair care is valued at \$11.06 billion, marking a 6.7% increase - the strongest growth among all sectors. 2-in-1 products are worth \$2.9 billion, growing 5.2%, and hair loss treatments total \$1.36 billion, up 2.6%.

Winter Edition: Woodland Whispers (UK)

Trend Notes: The new collection brings seasonal escapism into functional cleaning products, tapping into consumers' desire for home environments that feel cosy, natural and mood-enhancing. Forest inspired scents reflect the growing popularity of nature driven fragrance - pine, mossy woods and fresh outdoor air - especially in Autumn/Winter when people crave grounding, restorative atmospheres indoors. Connecting practical routines with emotional wellbeing, offers a little moment of 'enchantment' in daily life.

Woodland Whispers is a limited-edition winter scent collection from the brands Fairy, Flash, and Febreze. This collection is designed to evoke the scent of a forest.

The range includes: Fairy Platinum Washing Up Liquid, Fairy Platinum All-in-One Dishwasher Capsules, Febreze 3Volution Starter Kit, Febreze Bathroom Air Freshener and Flash Spray Wipe Done Multi-Purpose.





HOME CARE

MRS HINCH ALPINE ESCAPE

Trend Notes: Consumers are seeking products that go beyond function, transforming cleaning and laundry into uplifting, sensory experiences. The crisp alpine scent taps into the popularity of fresh florals and cool outdoorsy accords, offering a mental getaway during colder months. With coordinated product formats and influencer credibility, the range delivers emotional wellbeing, long-lasting fragrance and aspirational lifestyle cues to everyday routines.

Alpine Escape: Bluebells & Wild Berries

After an exhilarating day in the mountains, you return to a magical landscape under a starry night sky, your heart filled with joy. The crisp mountain air invigorates you, carrying the delicate scent of alpine flora and bluebells peeking through frost - the subtle fragrance of wild berries mingling with fresh snow.





HOME CARE

Tallow & Ash (UK) Country Club

Trend Notes: This launch taps into the rising quiet luxury and clean elegance trend, translating fashion aesthetics into laundry scents. With polished woods, airy florals, and crisp citrus, it evokes refined leisure and timeless sophistication - aligning with consumers seeking subtle, elevated fragrance moments in everyday routines. A different take on 'clean' scents in home care - moving towards fresh, woody minimalism.

Crisp, effortless, and refined.

This scent captures the quiet confidence of old-world luxury, polished wood, and perfectly pressed whites.

Top Notes; Lemon Verbena and Bergamot

Mid notes: Lily of the Valley and Pimento

Base notes: Vetiver, Cedarwood and Orris





HOME FRAGRANCE

Ecoya (Australia) Keepsake collection

Trend Notes: ECOYA's Keepsake collection blends personalisation, premium design and emotional gifting, key drivers in today's home fragrance market. Numbered scents and write-your-own labels turn fragrance into a memory-marking ritual, aligning with the rise of sentimental purchases – especially for gifting this holiday season to come. The sculptural glass vessels support the home décor crossover, where candles function as design objects to keep and reuse.

The Keepsake Collection invites you to personalise your scent: each fragrance is simply labelled “1”, “2” or “3” (rather than named) and comes with a blank space on the vessel where you can write a name, date or memory. Fragrance profiles are referenced on the packaging - so you can choose by instinct and emotion: “what resonates, what lingers, what feels like home”.

Keepsake 1

Top: Leafy Green, Violet Leaf Heart: Jasmine, Freesia, Violet, Strawberry Base: Cedarwood, Musk, Cinnamon

Keepsake 2

Top: Blackcurrant, Dewberry, Cassis, Geranium Heart: Freesia, Rose Buds, Gardenia, Orris Base: Guaiac Wood, Oakmoss, Suede

Keepsake 3

Top: Green Apple, Raspberry, Red Plum Heart: Lily of the valley, Jasmine, Rose Base: Red Cedar, Musk, Amber, Vanilla



HOME FRAGRANCE

Zara Home

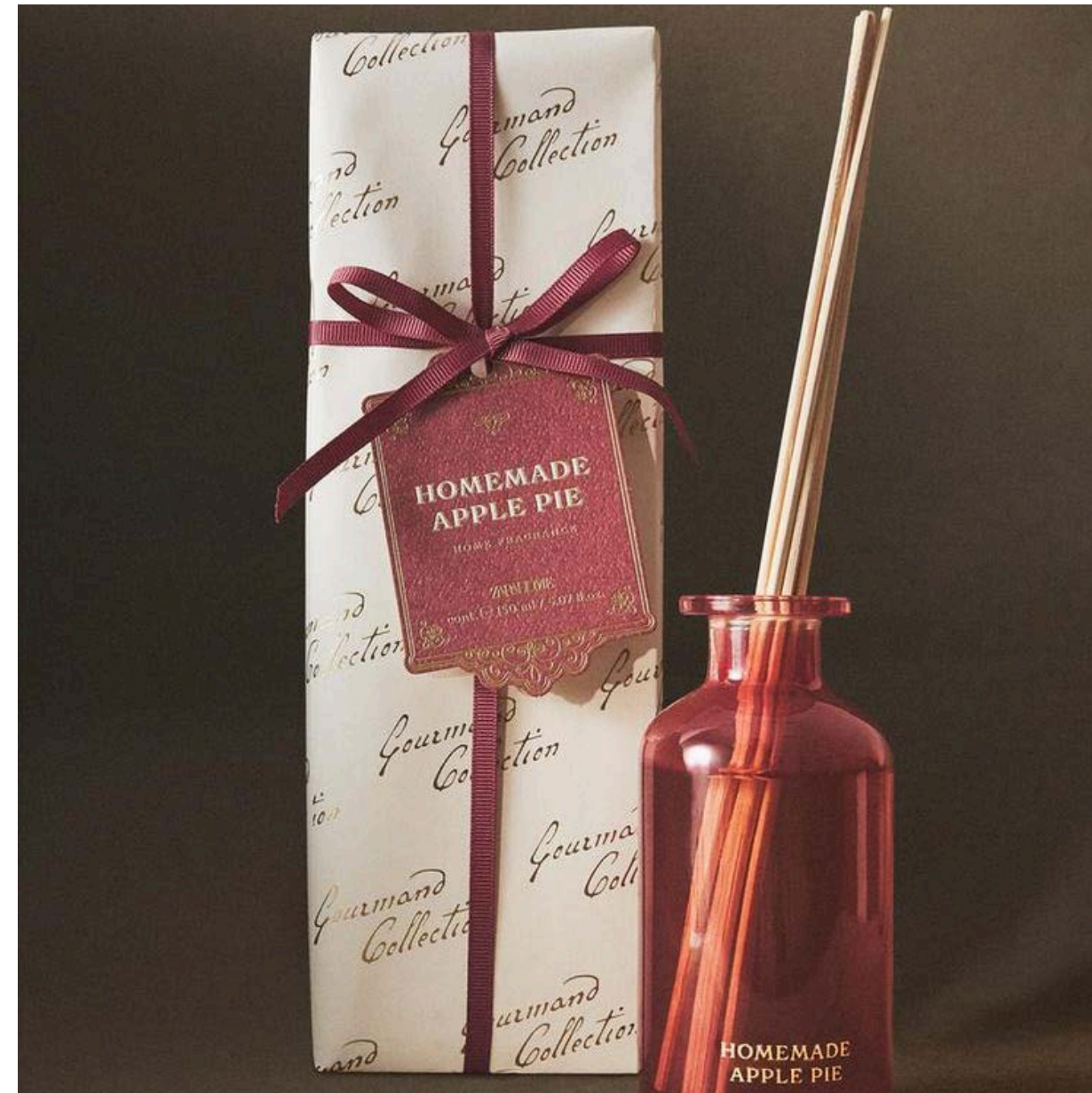
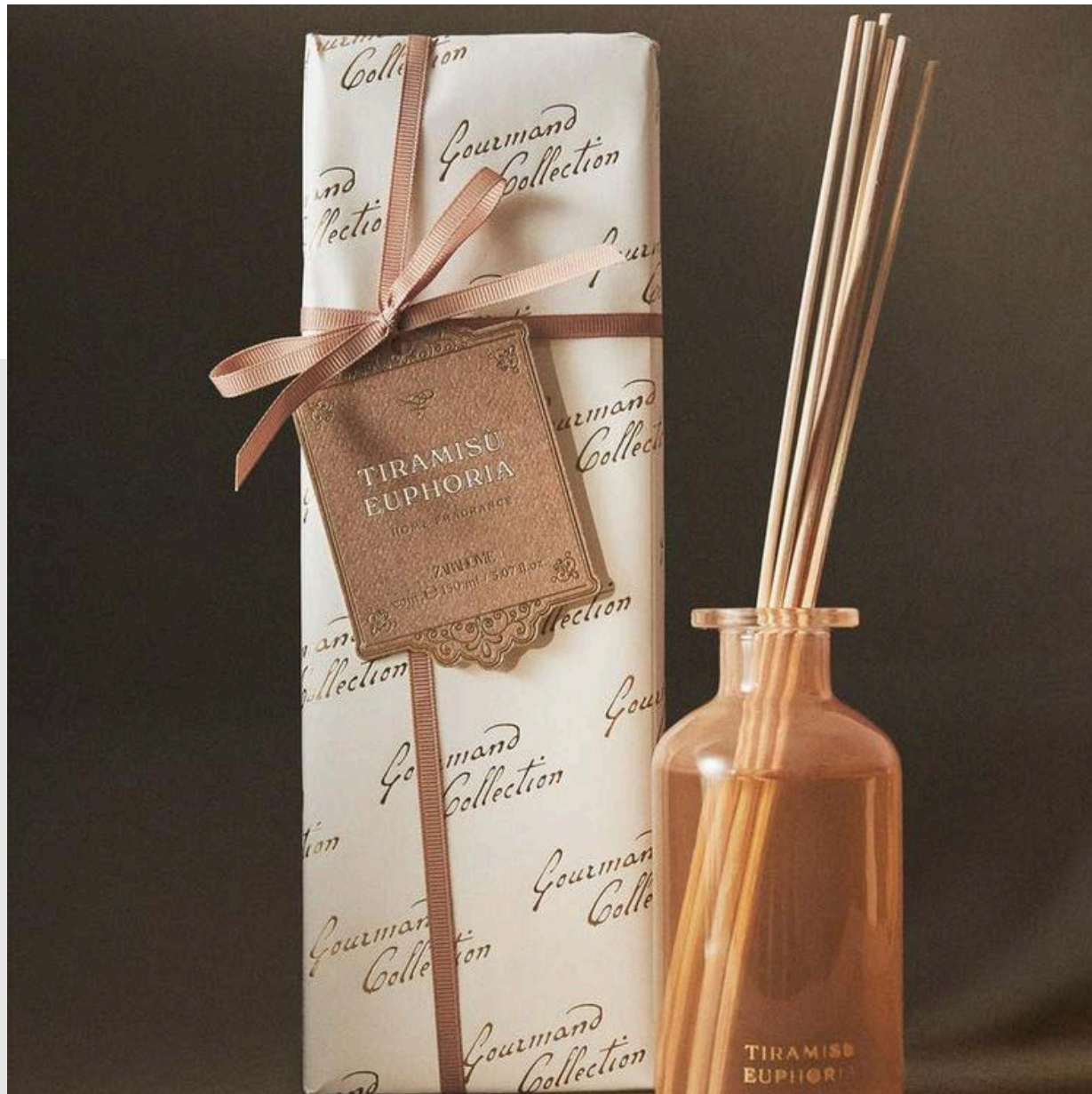
Trend Notes: Cosy, gourmand scents inspired by festive desserts and café culture. Each fragrance leverages nostalgia and emotional storytelling, evoking family gatherings, autumn holiday traditions, and indulgent treats at home - meeting consumer demand for comfort and self-soothing rituals.

Tiramisu Euphoria: An enchanting reimagining of traditional Christmas desserts that immerses us in the festive spirit of the season. With notes of coffee, tonka bean, whipped mascarpone, vanilla, sandalwood, amber and musk.

Homemade Apple Pie: A fragrance that reminds us of Christmas with the family. When the caramelised apple pie comes out of the oven and fills the kitchen with its aroma. With notes of apple, cinnamon, caramel, musk, vanilla and sandalwood.

Candied Lemon: This fragrance evokes the warmth of a freshly baked lemon cake, where sweet lemon meets the delicate charm of orange blossom, sweetened with rich brown sugar and creamy panna cotta, all wrapped in a comforting embrace of vanilla.

Mocha Coffee: A decadent embrace of indulgence. Bittersweet cocoa blends with creamy mocha mousse, while golden swirls of caramel and soft vanilla add an irresistible richness. A hint of salted peanut brings a playful, savoury contrast, creating a gourmand scent that's comforting and addictive—like savouring every last sip of your favourite coffee.





HOME FRAGRANCE

Yankee Candle: Cozy Cocktail Lounge

Trend Notes: Consumers continue to seek products that feel experiential and social, and these scents evoke nights out, cozy lounges, and memorable gatherings with friends. With notes like espresso, caramel rum, ginger, and vermouth, the range aligns with the comfort-forward, indulgent, and gourmand fragrance movement that has seen strong momentum in both candles and personal care. The emphasis on mood - from playful winery outings to warm bonfire nights - also reflects a shift toward story driven scent profiles that create an emotional connection and a sense of occasion at home.

Ginger Mule: It's a casual evening full of laughter and lively conversation as you catch up with your BFF. The two of you unwind in the fragrances of your favourite cocktail: warm ginger, zesty lime slices, and just a little bit of honeycomb for sweetness. Top notes: Ginger, Lime, Lemon, Citrus Tea. Middle notes: Orange Blossom, Cinnamon, Tonka Bean. Base notes: Vanilla, Honeycomb, Sugarcane.

Toasted Old Fashioned: Aromas of smoky birch, caramel rum, and toasted marshmallows set the vibe for an evening bonfire with old friends — inspiring the night's beverage of choice. Top notes: Birch, Rosemary, Juniper. Middle notes: Caramel Rum, Brandy, Bitters. Base notes: Vanilla, Sugar, Amber, Toasted Marshmallow.

Ruby Merlot: On a spontaneous winery tour, you and your companions enjoy a lighthearted day splashed with fragrance notes of blackberry, oak barrel, and sugared wine grapes. Top notes: Apple, Dried Red Fruits, Orange. Middle notes: Port, Cinnamon, Blackberry, Rose. Base notes: Oak Barrel, Sugared Wine Grapes.

Espresso Martini: Power your night on the town with invigorating — dare we say caffeinating? — scents of espresso bean, smooth caramel, and rich heavy cream. Top notes: Espresso Bean, Cocoa Powder. Middle notes: Heavy Cream, Caramel, Coconut. Base notes: Marshmallow, Whipped Vanilla.

Cozy Cocktail Lounge: Slide into a velvet-covered booth with your friends, confide in each other over your favorite drinks, and unwind as the lounge fills with scents of sweet vermouth and vetiver. Top notes: Bergamot, Lemon Zest, Rosewood. Middle notes: Cashmere, Peony, Rum, Sweet Vermouth. Base notes: Smoked Patchouli, Vetiver, Sandalwood, Crushed Velvet.





HOME FRAGRANCE

Voluspa: Gingerbread Chalet

Trend Notes: Voluspa's Gingerbread Chalet is perfectly on trend for autumn as consumers lean into cocooning, cosy rituals and nostalgic indulgence. The fragrance channels comforting holiday bakery notes; sugar-dusted ginger, cinnamon, clove and tonka bean - reflecting the strong gourmand and festive spice movement dominating seasonal home fragrance. Its storytelling of warmth, hospitality and escape mirrors the current desire for emotional transport, turning homes into inviting winter hideaways. With its nostalgic holiday twist and sensorial comfort, this launch aligns with the growing preference for scents that feel like celebration, tradition and sweet reassurance during colder months.

Fragrance Description: Seek shelter from the cold and step into the Gingerbread Chalet, where the fires burning, drinks are serving and notes of nostalgia and the holidays fill the air. An ambiance enveloped in sugar-dusted ginger, nestled upon layers of cinnamon sticks, crushed clove and smooth tonka bean. Allow its magical essence to fill the air, sprinkling notes of glowing comfort and delight. Consider this your invitation to check into Voluspa's Gingerbread Chalet.



HOME FRAGRANCE

Happy Wax: Dark Fairytales

Trend Notes: Consumers crave immersive, narrative-driven scents that tap into gothic nostalgia, fantasy culture, and mood-boosting escapism. Each fragrance transforms iconic story elements into modern olfactive experiences: **Wicked Woods** leans into earthy, atmospheric notes (soil, moss) tied to the dark nature trend; **Sleeping Curse** blends fruity florals with amber for romantic mystery; **Evil Queen** uses sharp eucalyptus and elegant jasmine to convey power and drama; and **Poison Apple** plays with sweet-green tension through apple, melon and bitter seed.

Wicked Woods features notes of soil, twisted elm, moss and wet earth, capturing a journey through a foreboding forest at dusk where pine, gnarled bark and decaying leaves guide you deeper into the trees through a chilling mist.

Sleeping Curse blends raspberry, magnolia, apricot and True Love's Kiss into an enchanting castle-like aroma of ripe fruit and delicate florals over a warm amber base, promising serene rest.

Evil Queen combines eucalyptus, jasmine, lavender and vanity into an icy floral that settles into commanding vetiver and amber, reflecting ruthless elegance.

Poison Apple contrasts apple, melon, strawberry and apple seed, offering a sweet yet unsettling temptation with subtle bitterness and a wicked green core.





PERSONAL CARE

Boy Smells (USA): Body Mists

Trend Notes: Consumers are embracing playful self-expression and fragrance-as-fashion. Chestnut Cheeks and Cherry Slay combine coy gourmand notes - roasted chestnut, brown sugar, black cherry and amaretto - with a visible beauty effect through skin-illuminating shimmer, aligning with the growing crossover between fragrance and cosmetics. The scents reflect autumn's love of warm, edible indulgence, while the glitter adds a party-season twist, tapping into Gen Z's taste for bold, confidence boosting sensorial products that look as good as they smell.

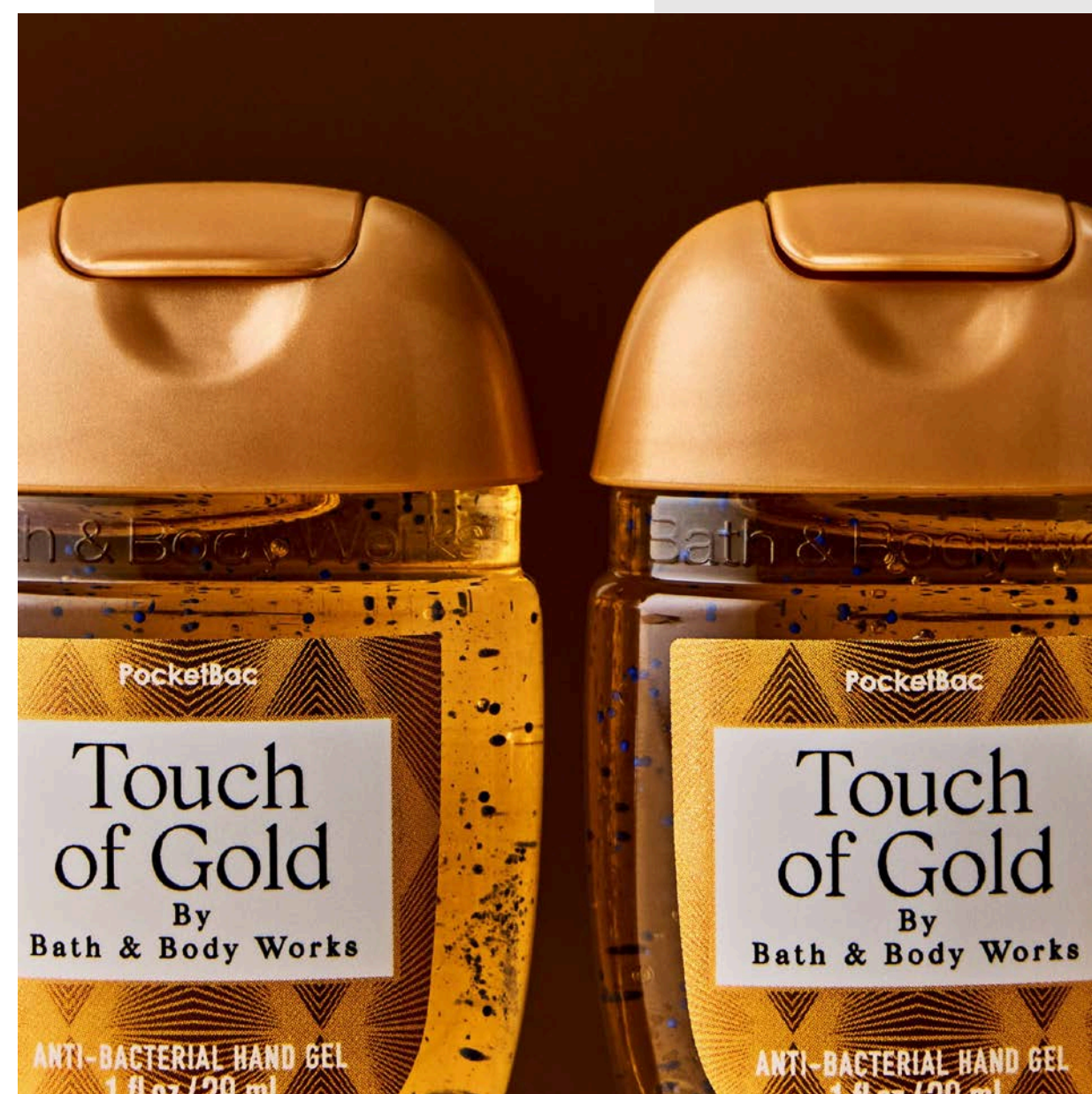
Chestnut Cheeks

Be the belle of the ball with this luminous hair and body mist - infused with gold shimmer to light up your skin. Warm roasted chestnuts and soft peony melt into a sweet base of brown sugar - cozy, radiant and impossible to ignore. This isn't just a scent; it's your secret sparkle - because your skin deserves the spotlight.

Cherry Slay

Glow up with this radiant hair and body mist. Black cherry and smooth amaretto melt into warm oakwood for a scent that's sweet, boozy and unforgettable. But the real magic? A pink and silver shimmer that catches the light with every move. Spray it on and leave a trail of glimmer in your wake.





PERSONAL CARE

Bath & Body Works Touch of Gold

Trend Notes: Bath & Body Works' plan to restore its shine. With a new CEO, a deeper push into fine scents and updated distribution channels, the mall mainstay is hoping to reestablish its position as the ultimate fragrance destination. Launches like "Touch of Gold" emphasise high-quality ingredients at accessible price points, while growing fabric care and men's categories bring Bath & Body Works's signature scents to new formats.

Touch of Gold: When you find a scent that matches your energy...say hello to the new gold standard. This is your aura, all bottled up in a fragrance. Indulge your senses with gilded fruit and a bit of floral warmth. Then, go ahead, serve the all-eyes-on-me experience.

Fragrance notes: bright blackberries, golden orange blossom and decadent tonka..

Fenty Skin: Body

Trend Notes: Rihanna's brand Fenty Skin announced the launch of its first body collection. The range emphasises "touchable textures and irresistible scents that are 'layerable' for the trending sensory + fragrance focus we are seeing in the body care/personal care market crossover. The packaging detail (grippy bases) were inspired by sneaker soles and shows attention to usability - especially in a shower/bath context, alongside featuring 30% post-consumer recycled materials. "Body care should feel like self-love," Rihanna said in a press release. "We wanted every texture and scent in this collection to instantly wrap you up and change your whole mood."

The new Fenty Skin Body Collection introduces three products — a body wash, bubble bath, and allover body mist.

Vanilla Flowers: Meet the softer side of sexy. Tahitian Vanilla and Vanilla Orchid combine with Fluffy Musk and Sugared Woods for that just-right mix of sultry + sweet that plays well any time of day.

Hey, Bouquet: Attitude—allover. Rose, Jasmine and Vanilla flirt with Sandalwood while Orange Zest and Pink Peppercorn spice things up. Play both sides with a scent that's as unexpected as you.

Green Raspberry: This is not your basic b...erry. A mischievous mix of Raspberry Nectar, Blackberry Delight + Crème De Cassis is spiked with White Tea, Sugared Rose + Sweet Amber for a totally twisted spritz.





PERSONAL CARE

La Maison Kilian

Trend Notes: Kilian Paris is expanding into more of a lifestyle brand, with the launch of scented bath and body products, and fragranced candles. The new offers fall under the moniker La Maison Kilian. “One is the natural extension of perfume, which is the body lotion and shower gel of existing scents,” said Kilian Hennessy, founder and creative director of the namesake brand. The body lotion and hand and body wash come with the fragrances of Kilian Paris’ global hero products, which include Good Girl Gone Bad; Angels’ Share, and Love, Don’t Be Shy. Sacred Wood is a bestseller in Asia, particularly in China.

Love Don’t be Shy: Neroli, Orange Blossom and Marshmallow

Angels’ Share: Cognac, Oak wood and Tonka bean

Sacred Wood: Amyris, Sandalwood and Copahu Balm

Good Girl, Gone Bad: Orange Blossom, osmanthus and tuberose





MEN'S FRAGRANCES

NEW LAUNCHES

Philipp Plein Parfums Plein Sport Thunder Bergamot, Hivernal, Aquozone, Gin, Juniper Berries, Bay Leaf, Cetalo, Cedar, Amber and Woodsy Notes.

Ellis Brooklyn Vanilla Man Juniper, Bergamot, Mandarin, Elemi resin, Clary Sage, Lavender, Vanilla Absolute, Olibanum and Atlas Cedar.

Ralph Lauren Ralph's Club Blackcurrant, Italian Mandarin, Bergamot, Lavender, Sandalwood, Geranium, Bourbon Vanilla, Fir and Oakmoss.



WOMEN'S FRAGRANCES

NEW LAUNCHES

TOCCA Laila Green Mandarin, Bergamot, Desert Rain Accord, Jasmine Nectar, Lily of the Valley, Cardamom Blossom, Toasted Vanilla, White Woods and Golden Amber.

Oriflame Divine Dark Velvet Black Baccara Rose, Black Coffee, Gardenia, Dark Vanilla, Patchouli and Ambroxif.

YSL Libre Vanille Couture Golden Vanilla Caviar, French lavender, Moroccan orange blossom, Black Bourbon Vanilla Caviar and Rum Absolute.



FINE FRAGRANCE

Snif launches Notewrks

Trend Notes: Snif are targeting men with three new scents designed to drop in December 2025, challenging the traditional idea of cologne with high-quality, non-toxic fragrances curated like a playlist - rooted in classic formulas but remixed for today, to be worn like favourite songs where music meets mood meets scent. The brand notes that 'olfactives' within cologne haven't evolved in a long time, with most profiles leaning barbershop, clean fougère or tobacco-leather-smoky woods; Noteswrks aims to reimagine successful scent profiles typically found in the feminine space for a male shopper.

Sunny Is a Feeling features bergamot, mandarin, grapefruit, tonka bean, cedarwood and vetiver; **Clean Getaway** highlights apple, a clean laundry accord, rice, dublimolide, orcanox and amberwood; and on the gourmand front, **Room for Dessert** blends strawberry, a crème brûlée accord, ambrette, cedarwood, vanilla and orcanox.





Premium, Indie + Niche Fragrances

PHLUR Cherry Stem

"Cherry Stem is a cocktail of juicy, dark, lacquered fruits – served with a twist. Black cherry and lush plum nectar layer with ebony wood and sugared jasmine, creating a swirl of bold warmth. Hints of leather and a spike of citrus develop into a cherry that's anything but innocent. Wear it when you want to leave an irresistible pull."

Top: Black Cherry, Orange Brandy

Heart: Red Freesia, Sugared Jasmine, Plum Nectar

Base: Ebony Woods, Warm Caramel, Soft Leather Accord





Premium, Indie + Niche Fragrances

HENRY ROSE French Exit

Henry Rose announces the launch of French Exit, a warm floral for autumn 2025. It follows this summer's Windows Down PCH, a crisp, aromatic woody fragrance inspired by road trips in Northern California.

French Exit was inspired by Ile d'Oleron (Oleron Island) off the Atlantic coast of France. The island is known for its fragrant dunes and sandy beaches. *"A study in the art of elusive departure — the quietest moves leaving the loudest echoes. Perfectly timed, unattainable, impossible to grasp".*

Top: Blackcurrant Bud, Pink Pepper, Lush Water Accord

Heart: Tuberose India, Jasmine Sambac, Sundrenched Petals

Base: Hawthorn, Driftwood, Skin Musk





Premium, Indie +
Niche Fragrances

D'ANNAM Mooncake

In anticipation of the newest d'Annam chapter to arrive this November, the brand has launched Mooncake, its second launch in the Majestic China collection to come.

Mooncake is a scent of sweet nostalgia - a warm, golden crust giving way to a luscious centre of salted egg yolk. Shared during Mid-Autumn Festival, this beloved treat marks memories of childhood joy and cherished tradition.

Notes: Golden Syrup, Salted Egg Yolk, Mung Bean, Lotus Seed, Honey and Vanilla



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.

