

Trend Report 2026

36th 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 in 2026 is evolving from the idea of a single signature scent into a more flexible expression of identity, mood and everyday ritual. Consumers are collecting, layering and experimenting with fragrance across multiple formats, while social media is changing how scent is discovered and understood through visual aesthetics, personalities and lifestyle cues. Alongside traditional eau de parfums, minis, body mists, hair perfumes, solid formats and alcohol-free fragrances are expanding the ways consumers experience and wear scent.

Five major shifts are shaping the category.

Sober scents capture the rise of alcohol-free fragrance, as water- and oil-based formulations move beyond niche positioning into skin-friendly formats spanning fine fragrance, body and hair mists and fragrance waters. Younger and wellness-oriented consumers are highlighted as particularly open to lighter, alternative formats, while new technologies are enabling brands to combine fragrance with hydration and other skin care properties. **Perfume personalities** reflect the growing connection between scent and lifestyle aesthetics, with “vanilla girl”, “clean girl”, “gourmand girly”, “fruit girl”, “granny chic” and “whimsy girl” translating fragrance into instantly recognisable visual identities and moods on social media. **Scent stacking** moves fragrance away from the single signature scent towards layering and wardrobing, supported by minis, discovery sets and complementary formats that allow consumers to build different combinations according to mood and occasion. Mini perfume searches increased 123% across Google and TikTok in 2025, while minis now account for 38% of prestige fragrances sold in the US. **Personalised fragrance** explores the next stage of bespoke perfumery, as consumers increasingly seek fragrances that provide a more individual expression of identity rather than a one-size-fits-all scent experience. **Slow perfumery** captures growing momentum around artisan fragrance and craftsmanship, with niche brands emphasising time, creative process and distinctive compositions as consumers seek scents that feel more unique and less driven by algorithms and mass trends.



Global Fragrance Growth Remains Strong

The global fragrance market reached US\$80bn in 2025, growing +8.8%, according to Euromonitor International. Growth varied across prestige fragrance markets, with Spain up +8%, Italy +7.8%, the US +5% and the UK +3% in 2025. France declined -3%, while Germany recorded growth of +0.5%. Looking ahead, Euromonitor forecasts the US to remain the largest global fragrance market in 2026 at US\$17.4bn (+5.8%), followed by Brazil at US\$10.0bn (+10.5%). The UK is forecast to reach US\$4.4bn, growing +8.1%.

Premium Fragrance Outpaces Mass

Global premium fragrance reached an estimated US\$52.2bn in 2025, growing +9.4%, compared with US\$27.8bn and +7.9% growth for mass fragrance. Within premium fragrance, men's scents reached US\$13.9bn (+9.6%), women's US\$27.0bn (+8.4%), unisex US\$5.4bn (+5.0%) and fragrance kits and sets US\$4.8bn (+9.8%). Ultra-premium fragrance, defined in the report as products priced above €130, also continued to outperform overall fragrance, recording +16% growth in Europe during 2025.

Body Mists & Alternative Formats Expand

Body mists are one of the fastest-growing fragrance formats. Globally, premium body mists reached US\$1.4bn in 2025, growing +12.7%, while mass body mists reached US\$2.3bn, up +11.2%. Across Europe, body mists and sprays increased +18% in value and +17% in units during 2025. The report also highlights continued brand activity across hair perfumes, fragranced body oils and lotions, solid perfume balms and alcohol-free fragrance formats.

HOME CARE

Febreze, Fairy & Flash Twilight Blooms

Trend Notes: P&G extends seasonal scent storytelling into Winter with Twilight Blooms spanning Febreze, Flash and Fairy. Rather than treating cleaning, dishwashing and air care as separate fragrance moments, the collection creates a coordinated scent experience throughout the home. The floral-fruity direction also offers an alternative to traditional pine, spice and gourmand profiles, using winter blooms and jewel toned fruits to create a more contemporary interpretation of seasonal fragrance. The launch reflects the growing importance of cross-category fragrance collections in household care, allowing consumers to layer a favourite scent across multiple cleaning and air-care rituals. Bold, beauty-inspired packaging and the evocative Twilight Blooms name further demonstrate how household brands are borrowing from personal and home fragrance to make functional products feel more sensorial, emotional and collectible.

Twilight Blooms is here. Big lights off. Curtains drawn. Twilight Blooms on.

Exclusive to B&M (UK), this luxurious blend of deep purple orchids and frosted red berries transforms everyday cleaning into a fresh, elevated moment at home.



Bref Power Limescale & Dirt Lemon

Trend Notes: Citrus freshness continues to hold its ground in household cleaning, where consumers strongly associate lemon with efficacy, hygiene and visible cleanliness. Bref's latest launch demonstrates how established freshness cues are being refreshed through more considered fragrance experiences. Rather than fragrance simply masking the functional base, the new lemon composition has been specifically developed to complement the cleaning process without becoming overpowering. The result reflects the continued importance of fragrance as a performance cue in hard surface cleaning, where scent helps reinforce perceptions of cleanliness and provides an immediate sensorial reward once the functional cleaning task is complete.

Powerful bathroom cleaning meets fresh lemon scent with the latest addition to the Bref portfolio.

Bref is expanding its bathroom cleaning range with Bref Power Limescale & Dirt Lemon, combining its proven cleaning performance against limescale and dirt with a new fresh lemon fragrance. Designed for everyday bathroom cleaning, the powerful formula tackles common challenges including limescale, water spots and soap scum. Its proven instant-action formula begins working immediately after spraying, quickly and effectively dissolving limescale and dirt without the need for additional soaking or contact time. Specially developed for bathroom use, the formulation provides visible cleanliness across a variety of surfaces while supporting quick and easy everyday cleaning.





HOME CARE

Mrs Hinch's Woodland Wander (UK)

Trend Notes: P&G reunites with Influencer Mrs Hinch for Woodland Wander, a B&M-exclusive limited-edition collection that takes consumers into a crisp, snow-covered winter landscape. Extending across laundry, cleaning, dish care and air care, the fragrance creates a coordinated scent experience throughout the home, reinforcing the growing move towards whole-home fragrance ecosystems.

Woodland storytelling, alpine imagery and cool blue-green aesthetics tap into the appeal of crisp outdoor air, snow-covered forests and botanical freshness, bringing an escapist, wellness-inspired quality to functional household care.

The wait is finally over... meet Woodland Wander, the newest Mrs Hinch collection.

Inspired by the restorative feeling of a winter woodland walk, Woodland Wander brings notes of fresh air, muguet, fern and fir pine into your home. A fresh, cosy and welcoming scent designed to turn your everyday cleaning routine into a little moment of calm - that aaaahhh feeling, every time. Your seasonal home refresh has arrived.





HOME FRAGRANCE

Happy Wax Golden Acre collection

Trend Notes: US brand Happy Wax's Golden Acre Collection taps into a more grounded interpretation of autumn, moving beyond familiar pumpkin spice to explore the woods, fields and harvests of the American landscape. Cedar, sagebrush, sweetgrass and squash bring an earthy, ingredient led quality, while amber, vanilla, almond and brown sugar provide seasonal warmth. The collection reflects growing interest in rustic nostalgia and harvest inspired fragrance, balancing wild botanicals and resinous woods with comforting gourmand notes. It also highlights the continued expansion of vegetable inspired accords, with squash joining the emerging garden-to-fragrance movement across home scent.

Cedar Chest: Worn wood, warm amber, and a soft, velvety depth that feels like opening something that's been treasured for generations. Rich, resinous, and quietly nostalgic.

Top: Aged Cedar, Balsamic Amber Middle: Sandalwood, Resin Base: Vanilla Musk, Crushed Tonka

Sagebrush & Sweetgrass: Wide open land distilled into a single breath, wild, herbaceous, and utterly alive. Crisp air mingles with sun-warmed grass and resinous green depth, settling into a clean, woody finish that feels like the West.

Top: Sagebrush, Bergamot, Eucalyptus Middle: Sweetgrass, Saffron, Orris Root Base: Blonde Woods, Fir Needle

Squash Blossom: Warm, golden, and quietly indulgent, this fragrance wraps buttery richness around soft autumn spice, with a bright citrus lift that feels like harvest season at its most generous and unhurried.

Top: Buttery Almond, Squash Middle: Creamy Vanilla, Cinnamon Base: Brown Sugar



Tesco F&F Home (UK) Dramatique collection

Trend Notes: Tesco F&F Home's Dramatique Collection brings a darker, more sensual mood to mass-market home fragrance, tapping into the continued premiumisation of supermarket scent. Black cherry, leather, tobacco, patchouli and dark cocoa create rich, fine-fragrance-inspired compositions that move decisively away from conventional fresh and fruity profiles. The collection also reflects the rise of after-dark gourmand, where chocolate, caramel and vanilla are deepened with woods, leather and earthy notes for a more sophisticated interpretation of edible fragrance.

Black Cherry: A bright, energising blend of raspberry, cherry and leather with additional spicy notes.

Onyx Black: A rich sensual aroma of tobacco, honey, patchouli, vetivert, vanilla & musk

Dark Cocoa: A delicious blend of black coconut, creamy caramel chocolate, sandalwood & vanilla.





HOME FRAGRANCE

LAFCO (USA) Pistachio Oud

Trend Notes: LAFCO's Pistachio Oud captures the continued evolution of pistachio from a playful gourmand note into a more sophisticated luxury ingredient. Here, its buttery, edible character is contrasted with dark resinous oud, woods and amber, creating a richer interpretation of the pistachio trend. The combination also reflects the growing influence of Middle Eastern fragrance profiles in home scent, where oud brings depth and opulence to familiar gourmand ingredients. Almond blossom, vanilla and violet soften the composition, highlighting the emerging gourmand-wood direction that balances sweetness with darker, more sensual notes.

almond blossom | pistachio | oud

A mélange of woods and decadence wrapped in luxury. Buttery pistachio melts into dark, resinous oud layered with almond blossom, violet, and rich amber and vanilla—enfoldng senses in an intoxicating, velvety warmth.





HOME FRAGRANCE

WoodWick (USA) Autumn Collection

Trend Notes: WoodWick's Autumn Collection reflects a move towards a more nuanced expression of seasonal comfort, combining familiar fall ingredients with less expected pairings. Hazelnut Roast taps into the growing café-inspired fragrance movement with espresso, coconut milk and hazelnut, while Crystal Ginger transforms spice through bergamot, orange blossom and marshmallow. Spiced Blackberry brings a darker fruit dimension to autumn, while Radiant Amber explores warmth without traditional gourmand cues through amber and smoky incense. Together, the collection shows autumn fragrance broadening beyond pumpkin and cinnamon towards coffee culture, dark fruits, modern gourmands and warm resinous compositions.

Spiced Blackberry: Ripe and freshly picked, these tart blackberry notes are sweetened by aromas of cinnamon, vanilla sugar, and a dash of zesty orange notes.

Hazelnut Roast: The scents of smooth espresso and coconut milk are blended together and topped with notes of crushed hazelnut in this invigorating fragrance

Crystal Ginger: On the edge of a forest, comforting notes of wild ginger are brightened by zesty bergamot and soft orange blossom aromas, then softly sugared with scents of vanilla marshmallows from a nearby campfire.

Radiant Amber: The feeling of basking in warm sunlight. Notes of golden amber, smoky incense, and vanilla bean radiate as one.



HOME FRAGRANCE

Bath & Body Works Reserve Collection

Trend Notes: Bath & Body Works elevates home fragrance with its Reserve Collection, pairing minimalist, design-led aesthetics with sophisticated scent profiles and introducing reed diffusers to the brand's home fragrance portfolio. Four new fragrances; Santal + Amber, Sea Salt + Musk, Lavender + Jasmine and Vanilla + Tonka - join bestselling Sweet Orange + Agave, creating a contemporary fragrance wardrobe spanning warm woods, skin-like musks, aromatic florals, gourmand warmth and bright citrus freshness. The collection reflects the continued premiumisation of accessible home fragrance, with elevated scent pairings and interior focused formats bringing a more refined, lifestyle led approach to the category.

Santal + Amber: sandalwood, cashmere and amber create a warm, textured scent with a soft, refined finish.

Sea Salt + Musk: bergamot, sea salt and vetiver bring a fresh, airy feel inspired by clean coastal notes.

Lavender + Jasmine: lavender, rosewood and sage offer a calming herbal-floral blend with a grounded, modern edge.

Vanilla + Tonka: vanilla bean, cedarwood and musk deliver a smooth, comforting fragrance that feels cozy without being overly sweet.

Sweet Orange + Agave: citrus, agave and jasmine add a bright, uplifting option to the assortment.



Lush Bathe to Feel Better

Trend Notes: The range reflects the continued evolution of bath care beyond general relaxation towards more personalised, problem solving wellness. Playful names and relatable need states make each benefit immediately understandable, while sensorial ingredients retain the escapism consumers expect from Lush. It is a strong example of how personal care brands are combining emotional wellbeing, physical comfort and product storytelling to make everyday routines feel more purposeful.

Cold Bath Bomb – to clear snuffy noses and counter colds

This Too Shall Pass – calming an overactive mind

Byegraine Bath Bomb – soothing support during migraines

Bathers Digest Bath Bomb – easing digestive discomfort

Dream Cream Soak – comforting dry, sensitive skin



PERSONAL CARE

Native Fall collection

Trend Notes: Native's Fall Collection reflects how autumn fragrance is becoming increasingly gourmand, ingredient rich and experimental, moving into bakery, nutty and fruit led territories. Sweet Hazelnut & Shortbread Crust and Creamy Pistachio & Vanilla Chai tap into the continued appetite for hyper edible gourmands, while pistachio reinforces its status as a key cross category fragrance note. Golden Persimmon & Amber offers a fresher interpretation of fall, introducing juicy persimmon and mango alongside creamy woods. Even the familiar pumpkin story is softened with vanilla tonka musk, signalling a more sophisticated approach to seasonal comfort scents across everyday personal care.

Native Cozy White Pumpkin & Clove

Blends pumpkin, cinnamon, and ginger with soft vanilla-tonka musk.

Native Golden Persimmon & Amber

Leads with juicy persimmon, mango, and red fruits, softened by airy florals and creamy amber-sandalwood.

Native Sweet Hazelnut & Shortbread Crust

Blends vanilla shortbread and bright lemon with rich brown-sugared buttercream.

Native Creamy Pistachio & Vanilla Chai

Swirls peach and red fruits with pistachio cream and warm vanilla chai spice, melting into caramel-coconut amber.



Nivea Treat Collection

Trend Notes: Nivea's Treat Collection takes the gourmand fragrance boom firmly into mass market shower care, transforming everyday cleansing into an indulgent, dessert inspired ritual. Vanilla Pecan Praline, Caramel Fudge and Dark Chocolate Cookie draw directly from bakery and confectionery culture, embracing increasingly literal edible scent profiles. The collection reflects consumers' appetite for comfort, playfulness and sensorial escapism in daily body care, while ingredients such as pecan, salted caramel, milk chocolate and almond show gourmands diversifying beyond vanilla. Limited edition positioning adds novelty and collectability, bringing the playful fragrance drop mentality increasingly seen in fine fragrance and body mists into everyday personal care.

Vanilla Pecan Praline

An irresistible scent of roasted pecan nuts, silky milk chocolate, and sweet vanilla.

Caramel Fudge

A warm scent of creamy, salted caramel fudge, rounded off with delicate vanilla notes, provides a gourmand and indulgent fragrance experience.

Dark Chocolate Cookie

A creamy dark chocolate scent and a hint of almond.



PERSONAL CARE

Bath & Body Works Into Orbit

Trend Notes: Bath & Body Works continues to strengthen its men's fragrance led body care offer with Into Orbit, bringing a darker, more expressive direction to the category. Warm musk, vetiver and night florals move beyond conventional fresh, aquatic masculinity towards a more sensual, after dark fragrance profile. The inclusion of florals is particularly notable, reflecting the softening of traditional gendered scent codes as men's fragrance embraces greater complexity and experimentation. Spanning body wash, body cream, lotion and deodorising body spray, the collection also highlights the growing fragrance wardrobe approach to men's grooming, encouraging scent layering across the daily body care routine.

An inviting blend of masculine warmth, earthy depth and intriguing florals, this alluring scent elevates any occasion.

Notes: warm musk, vetiver, night florals.

Bold and clean with an after-dark edge. Warm musk leads with fresh vetiver adding a crisp line and night florals linger for a magnetic finish, giving you night energy all day long.





PERSONAL CARE

Bath & Body Works Santal Ridge

Trend Notes: Bath & Body Works' Santal Ridge reflects the growing sophistication of men's personal care, with a layered composition that feels closer to contemporary fine fragrance than traditional men's grooming. Bergamot, fig leaf and pear bring fresh green brightness before transitioning into iris, jasmine, ambrette and moss, grounded by sandalwood, juniper and skin musks. The scent taps into the continued appeal of santal and modern woody fragrances, while the combination of wilderness inspired storytelling with softer florals, musks and fruit reflects a broader move towards more nuanced definitions of masculine fragrance.

An untamed exploration of citrus, woods and moss with a deeply grounding, adventurous edge.

Top notes: bergamot zest, crisp aromatics, fresh fig leaf, Anjou pear.

Heart notes: sheer iris, blue jasmine, ambrette essence, wild moss.

Base notes: silver amber, rich sandalwood, Caribbean juniper wood, clean skin musks.

A hidden ridge nestled among grounding woods and earthy greenery. The bright, crisp opening gives way to smooth warmth and rich depth. Rugged terrain meets refined wilderness in this intrepid, timber-clad luxury.





PERSONAL CARE

Rituals Uukumwe

Trend Notes: Rituals brings a spirit of unity and togetherness with Uukumwe, a new limited edition collection inspired by Namibian heritage. The fragrance combines fruity marula, Namibian myrrh and a kick of clove, creating a warm, culturally rooted scent story. Uukumwe reflects a wider shift in wellbeing from individual ‘me time’ towards more collective experiences. Through locally inspired ingredients, collaborative storytelling and sensorial rituals, everyday acts of self-care are reframed as opportunities for connection - to place, culture, community and one another.

Created in close consultation with members of the Ovawambo community, the collection’s storytelling and creative direction were shaped alongside Namibian creatives, including artist Tuli Mekondjo and musician Shishani. At the heart of Uukumwe is the marula tree - a symbol of gathering, connection and shared care. The collection also draws inspiration from the joyful Marula Festival, traditionally celebrated between March and April. Responsibly sourced Namibian ingredients, including marula oil, myrrh - or omumbiri - and ochre clay bring a strong sense of place to the range. Spanning bath, body, home fragrance, tea and fine fragrance, products include a Foaming Shower Gel, Body Butter, Fragrance Mist, Body Oil, Scented Candle, Fragrance Sticks and Rooibos Harmony Tea.

A new floral-gourmand-woody Eau de Parfum accompanies the collection - opening with juicy marula fruit, bright citrus and warm spices, Nouwa moves into a soft, powdery iris heart before settling into a creamy, skin-like base of tonka bean and cedarwood.





MEN'S FRAGRANCES

NEW LAUNCHES

GUCCI Guilty Intense Pour Homme intertwines woody aromatic accords and salty notes with lavender oil and palo santo for a smoky aspect and a creamy texture.

Giorgio Armani I Will a new vanilla scent for men with vibrant Bergamot, Cardamom, Lavender, Violet Leaf, Madagascan Vanilla and a Woody Leather Accord.

Calvin Klein Eternity Suede Essence for Men Clary Sage, Bergamot Oils, Aromatic Geranium, Lavender Oil, Rich Bourbon Vanilla Essence, Smooth Suede Accord Blended with Tonka Bean Absolute.



MaxMara
Le Parfum

The New Fragrance



WOMEN'S FRAGRANCES

NEW LAUNCHES

Max Mara Le Parfum Tuberose duo – fresh tuberose flower from Grasse and tuberose absolute from Guatemala, Vanilla, Sandalwood and Cedarwood.

Estée Lauder Glimmer Raspberry, Orange Blossom, Mandarin, Milk Mousse, Cashmeran, Macarons, Rose, Vanilla, Amber, Patchouli, Sandalwood, Tonka Bean and Cedarwood.

Rare Beauty Rare Beginnings Pear Nectar, Pistachio, Gardenia, Jasmine, Lotus Blossom, Vanilla Bean, Pink Sugar and Cedarwood.



Premium, Indie + Niche Fragrances

Acqua di Parma Cedro Virtuoso

Acqua di Parma expands its Signatures of the Sun collection with Cedro Virtuoso, a new Eau de Parfum built around the contrasting facets of cedarwood and a distinctive hazelnut co-infusion.

Inspired by the creative process, from the first spark of an idea to its realization, the fragrance opens with the bright freshness of Calabrian bergamot. Its citrus clarity is softened by a co-infusion of Virginia cedarwood and hazelnut, developed exclusively for Acqua di Parma. Hazelnut contributes a smooth, creamy character, while cedarwood preserves its dry, structured profile, creating a subtly gourmand woody signature. The heart explores three varieties of cedarwood. Virginia cedar brings warmth and softness, Atlas cedar introduces spicy and balsamic nuances, and Alaska cedar adds aromatic, lightly leathery facets. In the base, sandalwood, Ambrox and tonka bean absolute give the composition greater depth and a warm, enveloping finish.

TOP: Cedarwood Virginia and Hazelnut Co-Infusion, Calabrian Bergamot, Musk

HEART: Cedarwood Atlas, Cedarwood Alaska

BASE: Tonka Bean Absolute, Sandalwood, Ambrox





Premium, Indie + Niche Fragrances

NEST New York's Cardamom Latte Eau de Parfum

Like wrapping yourself in the finest cashmere, this warm and spicy scent takes you on a sensory escape. It opens with a burst of sweet cardamom, evoking that blissful first sip of a creamy, spiced latte. As it settles, a comforting heart of jasmine petals lends a subtle musk aroma before melting into a creamy base of rich coconut milk. Smooth, irresistible and cosy, it's the go-to fragrance for quiet, slow-paced days.

Top Note: Cardamom (green, sharp, and peppery opening)

Middle Notes: Coconut Milk and Jasmine Petals (soft, frothy, and lactonic)

Base Notes: Vanilla Cream and Rich Cream (cozy, cashmere-like dry-down)





Premium, Indie + Niche Fragrances

PHLUR **Vanilla Canyon**

A soulful yet sweet interpretation of vanilla that captures the feeling of limitlessness. Grounded in oak wood, this fragrance offers textured depth enriched by wild honey, velvet plum, patchouli, and tonka. Vanilla Canyon lingers on your skin like a warm sunrise, evoking awe-striking moments that inspire and invigorate. It is an ode to expansive horizons and the breath-taking beauty of nature's vast canyons.

Top notes: Tonka Bean and Plum

Heart notes: Wild Honey and Jasmine;

Base Notes: Madagascar Vanilla, Oak and Patchouli.



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

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Holland Aromatics is an international fragrance house based in the Netherlands, creating and manufacturing fragrances for customers around the world. Since 1984, we have combined creativity, technical expertise and a passion for fragrance to develop scents across fine fragrance, personal care, home fragrance, household and fabric care.

Today, our fragrances are sold in more than 60 countries, supported by in house perfumery, R&D and technical expertise. From interpreting the latest market trends to developing fragrances for specific applications, we work closely with our customers to turn ideas into commercially relevant scent solutions.

