

# Trend Report 2023

26<sup>th</sup> edition

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

Here we report on the most important 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.





# In Focus: Fine Fragrance

According to Circana (formerly NPD & IRI), in Europe; France, Germany, Italy, Spain and the UK, prestige fragrance sales were up 16% in 2022 compared to 2021, and up 11% in the US for the same time period, as the market continued to boom despite predictions of a slow down due to the ongoing economic crisis.

Driving market growth are stronger concentration scents with EDP's, Parfums, Extraits and Elixirs being in demand. The 'feel-good' effect has also had a huge impact on sales, as the spotlight on wellbeing that fragrance can provide to the wearer is in greater focus than ever after the pandemic years. Immediately post COVID-19 consumers were looking at scents of nostalgia and classic scents they found soothing, whilst now bold new fragrances that bring energy and excitement are back on the radar helping the niche category to explode and the dupe phenomenon we see trending on TikTok to increase fragrance status ever further.

## Global Value & Growth 2022

According to Euromonitor International the global fine fragrance market was worth \$57.4bn and grew +9.1% in 2022.

Source: Cosmetics Business

## Genderless Scents show greatest growth

Premium genderless scents accounted for the biggest growth in sales at +12.6% in a market worth \$3.8bn.



## Women's market still stronger in sales terms

Women's fragrances were worth \$10.5bn at mass sale level and \$20.3bn at premium level, compared to men's mass sales at \$7.8bn and men's premium sales at \$10.2bn.

## Discovery set sales were up in 2022

Premium discovery sets grew +7.8% in a market worth \$3.4bn as more consumers explored niche and indie fragrance brands.



# Tallow + Ash (UK)

**Trend Notes:** Since the pandemic, home care has got a new lease of life and laundry is in the spotlight this year. Tallow + Ash are dropping a new concept for a regular chore; Laundry Shampoo + Conditioner with a fine fragrance inspired, more sophisticated olfactive direction.

**Odyssey Non-Bio Laundry Shampoo + Conditioner:** Make every wash day an adventure with this masculine, woody and sophisticated fragrance. Similar to: Chanel, Bleu de Chanel

**Aurora Non-Bio Laundry Shampoo + Conditioner.** It's time to stop and smell the roses with these beautiful floral notes. Similar to: Viktor&Rolf - Flowerbomb, Dior - Miss Dior, Lancôme - La Vie est Belle

**Oud Non-Bio Laundry Shampoo + Conditioner.** Bring luxury to your wash days with Oud Laundry Shampoo and Conditioner. Similar to: Dior, Oud Ispahan

**Celestial Non-Bio Laundry Shampoo + Conditioner.** Fragrance that takes you out of this world. A sophisticated, oriental scent with floral notes. Similar to: Thierry Mugler - Alien, Dior - Poison

**Bahama Vibes Non-Bio Laundry Shampoo + Conditioner.** Bring the Bahamas, home. A coconut based scent designed to take you away.

**Duvet Day Non-Bio Laundry Shampoo + Conditioner.** Take a Duvet Day, you deserve it. A relaxing French Lavender based scent you'll be dreaming about. Made with essential oils







HOME CARE

# Limited Edition: OUAI x Dedcool Melrose Place Laundry Detergent (USA)



Trend Notes: Personal care and home care collide in the new, fragrance - focused, laundry detergent launched by OUI & DedCool, as the cleaning and home care market continues to get a premium style make over following the pandemic.

Brand story: Take Melrose Place from the streets to the sheets with Melrose Place Detergent. We put your favorite velvety-rich rose scent in DedCool's cult-favorite laundry detergent so you can smell like LA all over. Made for your sheets, clothes, intimates, delicates & your OUI of life.

Fragrance: A one-OUI ticket to L.A., Melrose Place has a velvety-rich rose scent infused with a swoon-worthy blend of bergamot, lychee, white musk, champagne, and more. TOP NOTES: Champagne, pink peppercorn, berry, lychee MIDDLE NOTES: Peony, rose, freesia, jasmine, bergamot BASE NOTES: Amber, sandalwood, white musk, cedarwood

Additional Info: Long-lasting scent, Safe for sensitive skin, Good for 60 washes, Ingredients naturally sourced from plant materials, 100% biodegradable, environmentally-conscious





HOME CARE

# Homecourt Room Deodorants (USA)

Trend Notes: Homecourt by Courtney Cox has launched a Room Deodorant collection. The brand is sticking by its more sophisticated 'functional' orientated roots launching a new, premium type of odour neutralising device.

Brand info: The deodorant neutralizes bad odours thanks to yeast ferment, which breaks down odour-causing bacteria, charcoal that purifies the air, and zinc ricinoleate to trap and absorb odour molecules.

Left behind is a fine-fragrance smell in the brand's four trademark scent options: the floral Steeped Rose, the crisp and bright Neroli Leaf, the heady and aromatic Cipres Mint, and the warm leather Cece.





# CALDREA Vanilla Quince Santal

Trend Notes: Premium home care brand Caldrea have launched their first new fragrance in ten years; Vanilla Quince Santal. Described as; Sensual, bold and abundant with cardamom, rose & sandalwood. The brand describes itself as ‘Thoughtfully formulated, premium products that are addictively delightful to use’.

The memory of a hand reaching for yours for the first time. You are captivated by a sensual fragrance of exotic spices and creamy florals, reminiscing. This is Vanilla Quince Santal.







## HOME FRAGRANCE

# PARTYLITE

**Trend Notes:** Soft sorbet flavours and frozen treats are going to be a key trend this year. The soft and nutty notes of Pistachio will be a consumer favourite. DS & Durga have re-released their Pistachio fine fragrance by customer request this year, and Kayali have released Yum Pistachio Gelato 33 Eau de Parfum, both of which will further influence the market.



### Mango Lime Sorbet

Fresh mango, lime zest and red ginger are stirred together for this cool and fruity fragrance.

### Pistachio Ice Cream

sweet vanilla cream is churned with roasted pistachio into a feel-good indulgence.

### Sweet Berry Gelato

We've whipped ripe strawberry, blackberry syrup and iced vanilla into an instant mood booster.

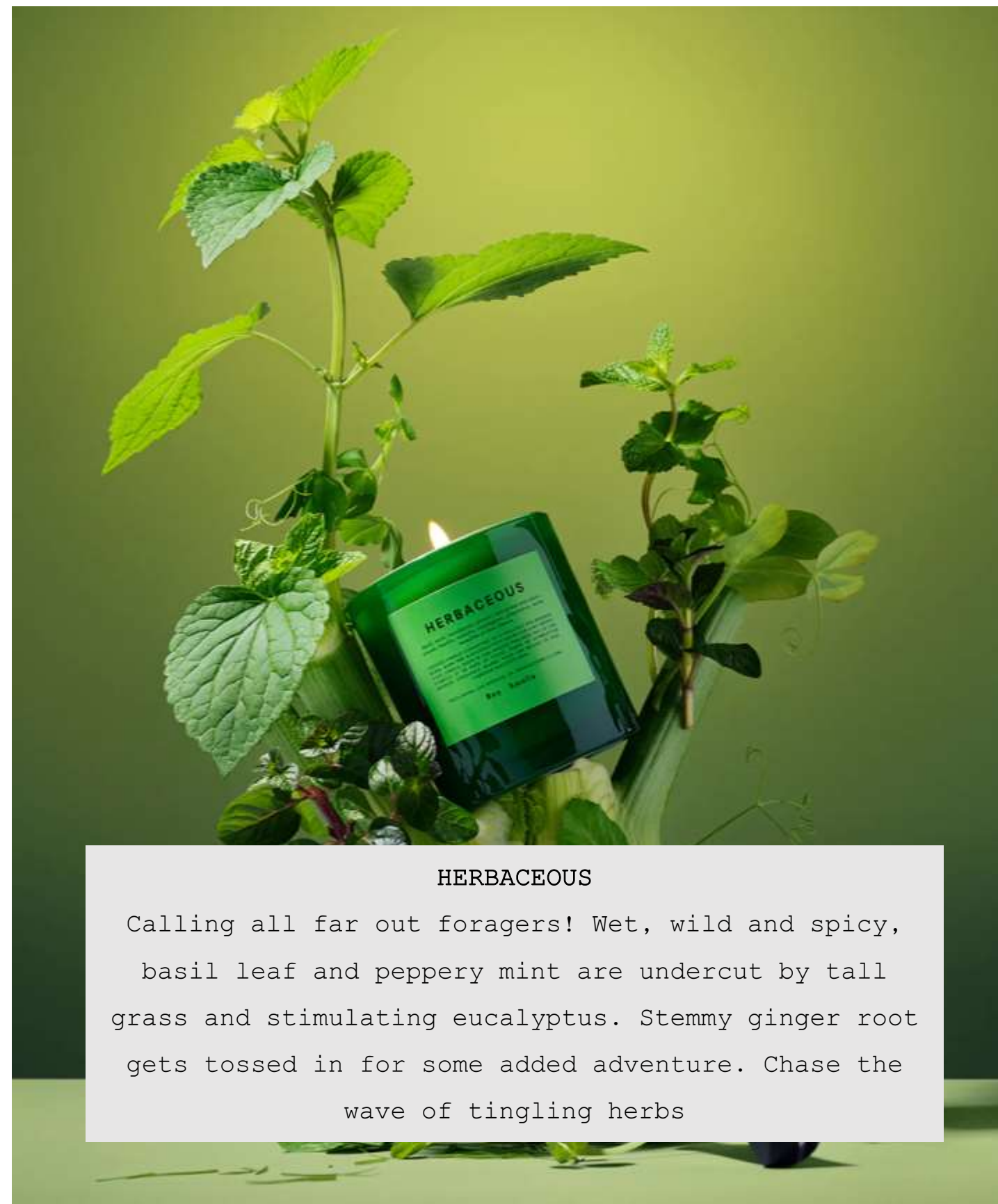
### Frozen Matcha Latte

Matcha green tea, almond milk and creamy vanilla are frothed into a frozen treat.



# BOY SMELLS Farm to Candle Collection

Trend notes: Notes full of gloriously green nuances are on trend. Last seen in full force in the 1970's we are seeing the category adapt to the latest scent preferences. In this new candle collection from US brand Boys Smells, Patchouli has returned, but brightened with watermelon, whilst herbal notes have a new spicy edge and green pepper is teamed with florals.



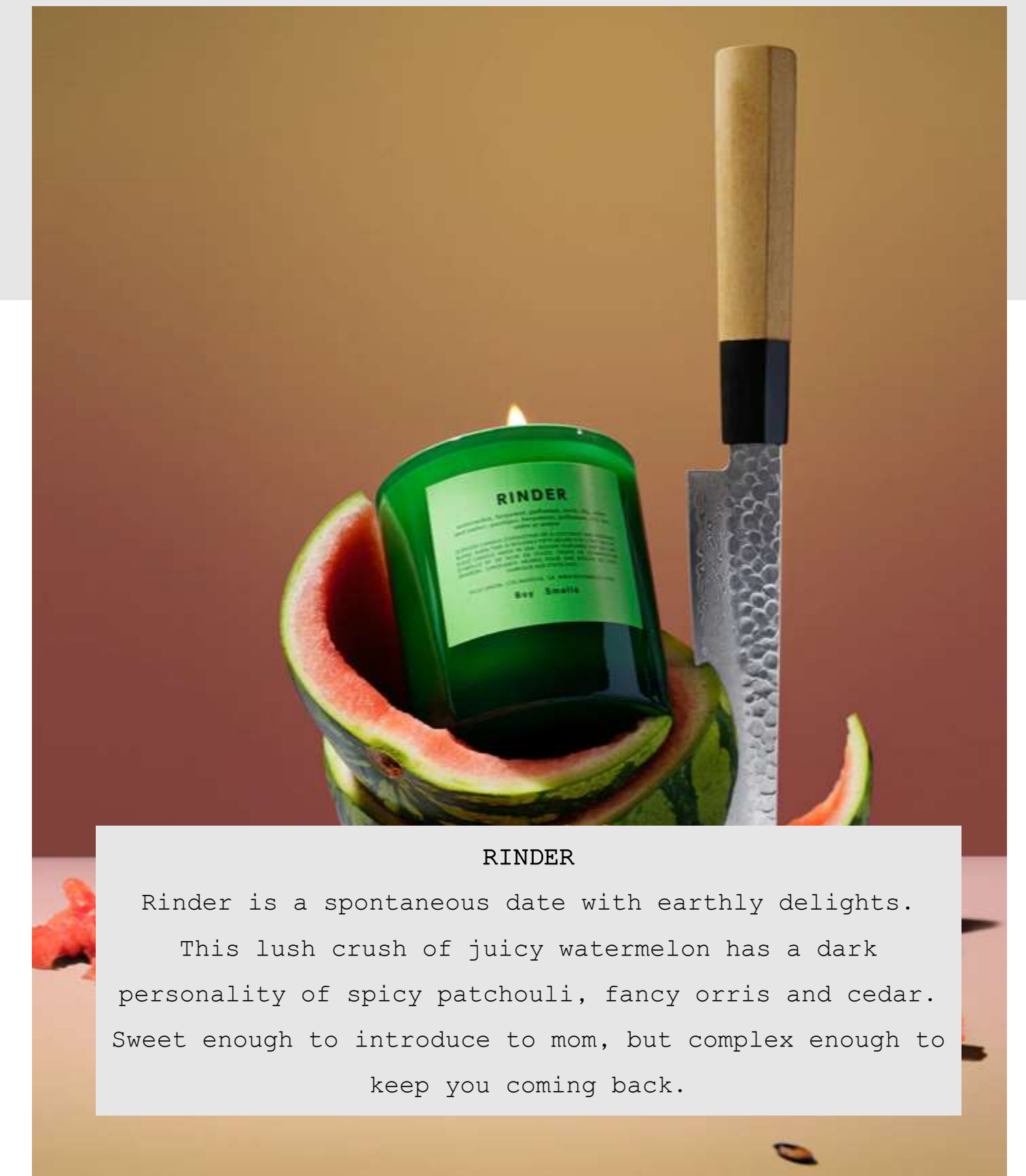
## HERBACEOUS

Calling all far out foragers! Wet, wild and spicy, basil leaf and peppery mint are undercut by tall grass and stimulating eucalyptus. Stemmy ginger root gets tossed in for some added adventure. Chase the wave of tingling herbs



## SNAP

Green bell pepper is king. Crisp and slightly sweet, the robust aroma literally snaps of earthy accords. Dried cut vetiver and petitgrain kick, but never overpower the fruit's natural sweetness, married with garden tuberose and hyacinth. It's a pleasant shock to the senses.



## RINDER

Rinder is a spontaneous date with earthly delights. This lush crush of juicy watermelon has a dark personality of spicy patchouli, fancy orris and cedar. Sweet enough to introduce to mom, but complex enough to keep you coming back.





HOME FRAGRANCE

## Nest Fragrances Santorini Olive & Citron

Trend notes: Savoury green notes from the olive inspiration and Mediterranean ‘sunshine infused’ – make this an ultimate summer scent. Avocado adds into the vegetable trend we have seen influencing fragrance choices.

Indulge in the splendors of the Greek islands featuring notes of fresh lemon zest and Mediterranean olive leaf blended with creamy avocado and hints of black pepper.





PERSONAL CARE

# SOL DE JANEIRO Summer Mood Mists

Trend Notes: The Summer Mood Mist Trio; a fragrant body mist capsule collection with uplifting benefits. After a long, cold winter, consumers are eager to purchase fragrant products that evoke summery, vacation scents. Body care products with refreshing and light fragrances virtually transport people to a tropical beach or a sunny resort, even if they are stuck at home or in the office. This capsule collection can't help but remind people of relaxation, happiness and carefree moments spent in the sun.

Set yourself on Do Not Disturb. Fresh and airy, this floral musk fragrance takes it easy like hotel mornings (or afternoons). Unwind with sheer notes of mimosa flower, nude musk, and warm sand. Spritz your way to summer with our limited-edition perfume mist. Do Not Disturb is inspired by hazy days and empty schedules.

It's Bikini Season somewhere. Tropical and juicy, this fruity gourmand fragrance captures the Insta-worthy feeling of poolside cocktails at your service. Chill out with succulent notes of guava nectar, sunlit orchid, and coconut water. Bikini Season is inspired by the feeling of living in your bathing suit.

Anything can happen When in Rio. Sparkling and seductive, this warm amber floral fragrance comes alive like the energy of a bright-hot night. Flirt with daring notes of wild bergamot, luscious pear, and twilight jasmine. When in Rio is inspired by the spark of a vacation fling.







PERSONAL CARE

# L'Occitane Artichoke Range

Trend Notes: This latest artichoke based skin care collection, taps into the new ingredients category in personal care; savoury and vegetable inspired notes and additives/actives.

Co-developed with Spa therapists, the Artichoke collection has a holistic approach in treating the body, mind and skin. Made with clean and plant based formulas, they detoxify the body and improve microcirculation while promoting a moment of well-being. Artichokes, rich in polyphenols and inulin, are recognised for their fat-digesting, diuretic, and cholesterol-fighting properties. To turn this detox superfood into a cosmetic extract, our focus turned to the leaves, which are best known for their medicinal properties. Grown organically in the Drôme region in the south of France, it is sustainably sourced and cultivated by farmers within a French Support and Work Assistance Establishment (ESAT). The range is housed in FSC-Certified packaging, meaning the paper used is obtained from sustainable forestry. This new range continues to align with L'OCCITANE's brand values and an ever-present journey to becoming more sustainable

**Artichoke Massage Cream: Sculpting & Hydrating:** An expert body moisturiser that firms-up the skin and provides up to 8 hours of hydration. Combined with massage, it also helps reduce swollen and heavy leg sensation.

**Artichoke Warming Body Scrub: Firming & Detoxifying:** An expert body scrub to gently exfoliate and promote cellular renewal, whilst improving skin's firmness.





PERSONAL CARE

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# THYMES

SIENNA SAGE

**Trend Notes:** The golden ‘glow-up’ of new personal care collections is still underway, as the soft comfort and decadent self care theme continues across seasons, with ingredients that are richer, wood-infused and earthy.

Surround yourself with the comforting notes of warm palo santo wood, soft amber, and clary sage that effortlessly blend with the soothing aroma of creamy benzoin resin and green fig to inspire moments of self-care.

The collection includes; body wash, body lotion, body scrub, body serum, eau de parfum, bubble bath, candle, hand wash, hand lotion, hand cream and Pura diffuser refill.





## AXE (UNILEVER) Finer than Collection

Trend Notes: Smell finer than fine fragrances with the G.O.A.T. Axe launch (aka Greatest. Of. All. Time). According to the brand 70% of guys in a blind study said they'd replace their fine fragrances with their favourite scent from the AXE Fine Fragrance Collection.

Blue Lavender infused with lavender, mint, and amber essential oils.

Pure Coconut infused with coconut, eucalyptus, and oak essential oils.

Golden Mango infused with mango, mandarin, and vetiver essential oils.

Green Geranium infused with geranium, cedar, and patchouli essential oils.

Aqua Bergamot infused with bergamot, sage, and juniper essential oils.

(Also launched in deo sticks and body wash).







MEN'S FRAGRANCES

## NEW LAUNCHES

Paco Rabanne Invictus Victory Elixir Aromatic  
Lavandin, Green Cardamom, Black Pepper, Incense,  
Indonesian Patchouli, Tonka Bean and Vanilla Bean.

Viktor&Rolf Spicebomb Infrared Eau de Parfum  
Pink Pepper, Chili Pepper, Cinnamon, Leather, Resins and  
Woody Notes.

Jean Paul Gaultier Le Male Elixir Lavender, Mint,  
Benzoin, Vanilla, Honey, Tobacco and Tonka Bean





WOMEN'S FRAGRANCES

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## NEW LAUNCHES

**Lancôme Idole Now** a blend of three main notes, each enhanced with green science; Uplifting Rose, Powdery Orchid and Creamy Vanilla.

**Carolina Herrera Good Girl Blush** Italian mandarin, Italian bergamot, Peony, Ylang-Ylang, Upcycled Rose Water, Vanilla Absolute and Tonka Bean.

**Dolce & Gabbana Violet:** Cassis, Cyclamen, Mandarin, Violet, Blackcurrant, Pear, Musk, Sandalwood and Vanilla.





## LOUIS VUITTON PACIFIC CHILL

Pacific Chill captures the sensation of the sun's warmth on bare skin – a feeling of pure well-being and endless indulgence. The fragrance's fresh and pure energy draws inspiration from California's health and wellness culture and reflects the revitalizing power of the ocean, essential to maintaining balance and well-being for the body and mind.

Pacific Chill is a blend of black currant, carrot seeds, and aromatic herbs. Inspired by California's popular detox smoothies, the scent's lively and fruity blackcurrant notes are accompanied by cedrat and lemon undertones. Coriander and ambrette seeds, basil, peppermint, and orange extract add a changeable nature to the currant notes that feel like leaves brushing against the skin. The green tones are softened by carrot seed, together with creamy, velvety accents of apricot, date, and fig, providing the fragrance with depth and structure. A hint of May rose offers floral sweetness and connects all the elements together.

*Top: black currant, mint, orange extract, coriander, cedrat, lemon*

*Heart: May rose, basil, carrot seeds, apricot*

*Base: ambrette, fig, jujube*

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Premium, Indie +  
Niche Fragrances







## ETAT LIBRE D'ORANGE SOUS LE PONT MIRABEAU

Sous Le Pont Mirabeau ("Under the Mirabeau Bridge") draws its inspiration from the historical monument Pont Mirabeau bridge in Paris and Guillaume Apollinaire's poem of the same name.

The fragrance strives to encapsulate the firm foundation of the bridge by blending cedar and sandalwood. It is to be a fragrance that possesses a strong poetic quality, where the yearning for love coexists with the bridge's unwavering power, unaffected by the flow of time and water. The concept aims to capture the essence of love stories in Paris, including unrequited love and the bittersweet memories of love that have passed, by allowing itself to be carried along by the gentle current of the Seine.

The composition begins with energising bergamot, pink pepper, and elemi resin with a touch of fig. The esoteric aquatic and ozonic notes are made sturdy by the play between cedar wood and sandalwood, wrapped up in musk and vanilla. There is also orcanox, the molecule that comes from sclareol, a natural compound extracted from exhausted clary sage, and has a woody scent with musky and powdery tones.

*Top: Italian bergamot, pink pepper, elemi, fig leaves*

*Heart: violet, aquatic notes, frankincense, ozonic notes*

*Base: orcanox, sandalwood, musk, Virginia cedar, vanilla*

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Premium, Indie +  
Niche Fragrances







## MILLER HARRIS HYDRA FIGUE

This is a scented story of human nature, slow-living, and creative fuel. Hydra Figue was inspired by the natural wild beauty of the Greek island of Hydra ('the Pearl of the Aegean Sea'). Hydra is an island where there is no rush hour, only the call of church bells and the lapping of the clear sea against rocky shores. The scent of aromatic fig trees and freshwater springs dance across a rugged landscape, where bohemians and artists have long flocked for inspiration and artistic sustenance.

*Top: Bergamot, Cardamom, Citron, Ginger, Greek saffron, Lemon, Ouzo*

*Heart: Fig, Tuberose, Sea Salt, Sage, Marine Accord, Mirabilis Jalapa*

*Base: Benzoin, Musk, Ambroxan, Sandalwood, Vanilla, Oakwood (upcycled)*

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Premium, Indie +  
Niche Fragrances







## DIOR DIORIVIERA BY FRANCIS KURKDJIAN

DIORIVIERA is designed to convey modern and romantic impressions inspired by the rose garden near Château de La Colle Noire, located in the South of France.

Dioriviera is a fragrance that celebrates life as positive as the sun. Although it is a fragrance that evokes the atmosphere of summer by itself, it is a bright, refreshing and joyful fragrance that you will want to wear all year round.

Soft, green, fruity and honeyed shades. A sensual duo born from the encounter of rose and fig leaves that shines bright like the sun. Dioriviera is an unforgettable scent that expresses the early Summer sunshine in the south of France, the blooming rose de mai, and the warm breeze that blows through the thick leaves of a large fig tree. The latest fragrance Dioriviera belongs to La Collection Privee.

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Premium, Indie +  
Niche Fragrances





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

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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.

