

THE FUTURE OF FRAGRANCE: 2021

Global annual review: what's now and what's next for the fragrance market.



Lucy Cornford, BPC
Content Manager - EMEA



Report Content



- Branch out to help combat drudgery and protect fragrance sales post-COVID-19
- Promote uniqueness and build synergies to protect and progress business
- Expected impact of COVID-19 on the fragrance category, as of 16 June 2020
- What's in this report

IMMEDIATE FUTURE: NEXT TWO YEARS

Accelerate consumer education for better transparency

- Mintel recommends
- Address the necessity of clean fragrance
- Take a leap towards trust with clean certifications
- Partner transparency with education and certification
- Leverage consumers' curiosity about fragrances
- Provide 360-degree education
- Use celebrity 'edutainment' for accessible and fun education
- Adopt digital tools to better deliver information
- Grow awareness around biotechnologies to pave new clean stories
- Take a sustainable angle to sell biotech ingredients
- Sustainable credentials have fully joined the clean halo
- Dial up the sustainability narrative for biotech ingredients
- Adapt your approach regionally to sell sustainable synthetics
- Highlight natural origins in biotech
- Focus on safety and efficiency to sell biotech in China
- Pair biotech ingredients with clear benefits
- Fermentation opens up new gourmand territories
- Leverage science to earn consumers' trust
- Infuse scent creation storytelling with science
- Recreate a dream with synthetics
- Beautify science in a fragrance's name

Recognise the new gender paradigm and reinvent seduction

- Mintel recommends
- Take notice of the change in gender paradigms
- Recognise the plurality of genderless expressions
 - Graph 1: unisex fragrance launches, by region, 2015-19

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- Genderless fragrance is a safe bet in Europe and the US
- Asia's diverse take on unisex fragrance
- Promote scent subtlety with unisex fragrances in LATAM
- Tackle the gender conversation with genderless fragrance
- Take a stance and express consistent solidarity
- Boost genderless appeal with a new packaging approach
- Boost bottle design with genderless retro cues
- Avoid stereotypes in gendered concepts
- Inject nonconformism in gendered stories
- Address multi-dimensional gender diversity
- Evolve gendered storytelling on friendships
- Address the full unisex spectrum
- Address confidence and self-love
- Being attractive lies in confidence and uniqueness
- Calvin Klein CK Everyone campaign
- Reignite the sense of touch
- Address intimacy through scent and touch
- Accelerate tactile innovations in the COVID-19 era
- Give more freedom and diversity to seduction narratives

Renew luxury strategies to challenge the masstige revolution

- Mintel recommends
- The luxury fragrance challenge
- Fine fragrance formats provide a sense of luxury
- Backtrack the reduction in spending via exclusive elements
- Luxury with a purpose
- Convert more younger consumers to luxury fragrance
- Innovate to surprise and delight younger consumers
- Develop collaborations with creative inventors
- Facilitate collaborations between luxury and mass
- Perfumer 'agencies' reinvent the perfumer-brand collaboration
- Reinvent luxury packaging to be more sustainable
 - Graph 2: consumers who agree that luxury fragrance bottles need to have heavy packaging, by select markets, October 2018
- Combine innovative design with sustainability
- Explore ethical wood for multi-textural effects
- Look at green technologies for extraordinary materials
- Adopt reusable scarves for high-design gifting

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- Minimise the impact of lost sales from travel restrictions
- Re-focus on local distribution with travel-size formats
- Add value in travel formats
- Leverage department stores' sense of a place
- Offer escapism with store collaborations
- Solve consumer anxiety with pop-up stores
- Create creative momentums with drops
- Drop culture and preordering has entered the niche fragrance segment

PLANNING AHEAD: NEXT FIVE YEARS

Navigate scent discretion with holistic functionality

- Mintel recommends
- Notice the preference for scent discretion
- Brands explore 'clean' olfactory silence
- Retailers create scent-neutral occasions
- Social distancing hinders fragrance usage
- Extend reasons to wear fragrances
 - Graph 3: consumers who disagree that fragrances are only necessary when around others, by select markets, September 2019
- Develop scent care
- Accelerate your mood fragrance offer
- Patent activity is strong for mood fragrances
- Invisible design is the next step in scent care
- Take a proactive approach to mood fragrance
- Create the scent of a moment
- Multiply scent usage with nighttime benefits
- New scent diffusion allows for more invisibility

Online growth highlights urgency for new sensory vocabulary

- Mintel recommends
- Fragrance brands struggle to sell online
- Use colours to create a new scent vocabulary
- Create synergies between shape and scent
- Harness the possibilities of 3D printing
- Expand the parameters of personalisation
- Tap into consumers' instincts for personalisation strategies
- Pave the future of personalisation with sensory responses

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- Tackle social media with multi-sensory cues
- Picture the scent
- Reinvent sampling to convert sales

FOUR WINNING STRATEGIES FOR THE FUTURE

- Four winning strategies

MARKET OVERVIEW: KEY DATA AND INTERPRETATION

- Reset the clock: COVID-19 is changing the market
- A global market pushed forward by Brazil, while European and US sales decline continues
- Brazil was meant to lead global fragrance sales in 2021
- Negative growth on horizon for developed fragrance markets, while Eastern Europe's growth speeds up
- Europe spends the most on fragrances
- Russia's strong growth brings the market second in 2022
- Ethical claims in NPD continue to progress
- Contributors

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Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850