

Fragrance figures and insights

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Clayton Ilohita on the latest global fragrance trends.*

FIRST QUARTER RESULTS REVEAL THE ONGOING CHALLENGE

Pre-Covid-19 fragrance launches were increasing year on year. The downturn we've seen is a force majeure that has many brands reassessing their future. Fragrances of the World's latest industry report shows the extent to which the global pandemic has impacted growth.

Launches for the first quarter of 2021 are down 35 per cent compared to last year's pre-pandemic quarter. With most countries yet to complete their Covid-19 vaccination programme, and travel restrictions and lockdowns continuing to impact retail business, this decline was expected. By the third quarter of 2020, the figure exceeded a decline of more than 40 per cent, so we are now seeing improvement. Looking at the number of launches by distribution, niche and luxury started the year strong, a positive sign given how much niche fragrances now contribute to the annual number of launches. Prestige launches for the first quarter were below average, but we forecast the numbers will increase as the year progresses. Less assured are the number of launches we are tracking for Lifestyle and Mass. While these products remain significant, fragrance is rapidly returning to its status as a luxury product. We anticipate limited edition

Total	
Year	Launches
Jan-Mar 2021	588
Growth	-35%
Jan-Mar 2020	899

Total	
Year	Launches
Jan-Dec 2020	2619
Growth	-30%
Jan-Dec 2019	3727

2020 Top 20 Ingredients	'dominant' note	Total
Musk	309	1007
Rose	234	665
Patchouli	203	666
Sandalwood	188	631
Bergamot	163	697
Vanilla	161	563
Jasmine	156	488
Cedarwood	143	489
Amber	134	515
Oud	131	219
Orange blossom	125	236
Vetiver	105	389
Iris (orris)	91	239
Pink pepper	86	252
Tonka bean	85	293
Lavender	84	205
Mandarin	81	298
Leather	80	210
Cardamom	73	247
Saffron	73	176

launches, often linked to a specific upscale department store, to be lower than usual until physical retail returns to normal.

For now, there is a focus on quality over quantity, with significant launches like Hermès' new men's pillar H24, a fragrance that presents an unconventional masculinity with its use of modern green notes. After a challenging year, fragrances that evoke serenity and connection to nature are popular themes in 2021 launches.

2020 FIGURES AND INSIGHTS

Last year global fragrance launches declined, finishing more than 30 per cent down compared to 2019. There was an increase in launches in the fourth quarter of 2020, but the global pandemic impact on the fragrance industry was evident. Although the 2020 statistics are stark, conversations we have had with industry colleagues demonstrate the incredible optimism and resilience of the fragrance industry. Early results for 2021 are now showing signs of improvement in areas.

The results are varied when looking at launch numbers by distribution (niche, luxury, prestige etc). Cancellation of annual exhibitions like Escent, Pitt Fragrance and Cannes' TFWA, seen as launchpads for new fragrances, had a noticeable impact on niche launches. Small independent brands

were more cautious during the pandemic, with many postponing launches or focusing on other products like hand sanitizer, or product extensions of existing fragrances.

When the world is under economic stress, consumers often spend disposable income on luxury items that have a timeless appeal rather than fast consumer goods. This is one explanation as to why luxury and prestige launches were least impacted, and the recession of lifestyle and mass

was much higher. Another explanation is, repeating the point made in our first quarter 2021 analysis, independent of the pandemic, fragrance is realigning itself with luxury. Lifestyle and mass fragrances are important to the industry, yet we are seeing designer brands increasing their focus on creating luxury collections and niche, which typically represents a higher retail value.

Analysing the most used ingredients in 2020 launches, we see they align with the four most popular fragrance families for 2020 – Floral (21%), Woods (13.1%), Floral Oriental (12.9%) and Woody Oriental (12.6%).

You might expect trends in ingredients to develop quickly but our data shows that trends often take years to develop and peak, like the rise of oud fragrances or pink pepper being used to enhance top notes. The most popular fragrance families of 2020 are consistent across the past five years.

TRENDING IN 2021

50 Shades of Green

A new colour palette of green notes has brought a calming, natural theme to fragrances launched during the pandemic. Popular notes include galbanum, lentisque, ivy, lechthacos flora, jungle leaves, cucumber, and green mandarin.

Example: Enclave by Anouage

Notes of spearmint and cardamom evoke the deep freshness of Musadam's fields in Oman. This cool green opening is closed with warm notes of amber and leather.

Abstract Fruit

Niche and luxury brands are reshaping consumer views of fruity notes, commonly associated with mass market fragrances, functional cleaning and personal care products. These new, unconventional fruity notes feel sophisticated and opulent.

Example: Étoile Filante by Louis Vuitton

Osmannthus' fruity facets of apricot, cassis and delicate peach skin are further enhanced with a note of sun-ripened strawberry.

Powder Puff

A renaissance in soft floral fragrances that smell comforting and feminine.

Popular notes include orris, almond, rice powder, white musk and ambrette seed. Modern synthetic notes allow these fragrances to smell nostalgic without feeling dated.

Example: Magnifying Musk by Bulgari

A magnification of ambrette seed and modern musk leads to a warm and sultry perfume that feels intimate and embracing. While 2021 launches do not match the pre-pandemic figures we are used to, this year has started with an energy and



of fragrances could build a community, and knowledge about fragrances shared in an informative and entertaining way. Naturally, people might have expected the site to favour Piig's own brands, but nothing was further from the truth.

With its sight set firmly on building a sustainable future for fragrances, the project wasn't seen as a marketing opportunity, rather it was about investing in a way to help consumers be more educated and continue to build their passion for fragrances. In the long term this could only be good for sales, but the new site had to be entirely impartial, and the information needed to be accurate. Piig asked their perfumers where they sourced their fragrance data from: the unanimous response was Michael Edwards' Fragrances of the World. A partnership was soon formed, and the result was www.wikiparfum.fr where Michael Edwards' database powers the site with real-time information.

The public have complete access to Wikiparfum for free. Favorite fragrances can be recorded in a profile that the site uses as a basis for fragrance recommendations. Fragrance matching has been the core of Michael Edwards' business since he started Fragrance of the World in 1983. Now pairing technology and artificial intelligence with the matching algorithms Michael spent decades refining, Wikiparfum is one example of how Fragrances of the World's work is brought to life in an interactive digital environment. Users also run complex searches by ingredient, search by fragrance or brand, and see information on thousands of fragrances. Results display a fragrance with Michael Edwards' classification, olfactory notes, description and performer name. Beautifully presented, Wikiparfum is a fantastic resource we hope everyone will explore and enjoy for themselves.

WIKIPARFUM PIONEERS A NEW WAY TO SELECT YOUR NEXT PERFUME

One of the important projects our founder Michael Edwards worked on in 2020 was a partnership with leading perfume and cosmetics company Piig. In 2019, Piig's head office in Barcelona noticed a downturn in fragrance sales, yet they were puzzled when their research revealed how passionate consumers were about the world of fragrances. Many online communities and blog sites existed where consumers received and exchanged knowledge about fragrances, but Piig had concerns over the accuracy of content being shared. Piig set out to create a site where lovers

Clayton works in communication and evaluation for Fragrances of the World where he assists industry guru Michael Edwards with the collection and evaluation of fragrance data from around the world. He is responsible for the communication of data insights and trends from the company's award-winning database. Clayton has over 10 years' experience in fragrance journalism, learning and development and luxury retail. He has completed numerous summer schools at the Grasse Institute of Perfumery and has a passion for creative perfumery.

