Fragrance Report

JULY 2025

CentricSoftware

Data Source + Methodology

E-Commerce Data

We daily analyze e-commerce sites and pull in key metrics like assortment mix, pricing, discounting and more.

Online Search Data

Our Trend Radar organizes online searches by category, growth, geography, so you can see assortment and marketing opportunities.

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Scent Shift

Fragrance is having a moment, but it's not about chasing trends. Instead, it's about emotional connection, collectability, and the role scent plays in personal identity. Since early 2024, fragrance product counts have surged, far outpacing skincare's growth. Today's shoppers aren't loyal to brands; they're loyal to stories. They're curious, open to experimentation, and looking for scents that feel like them. With unprecedented variety at every price tier, today's consumer has the freedom to match their purchase to any mood, style, or budget.

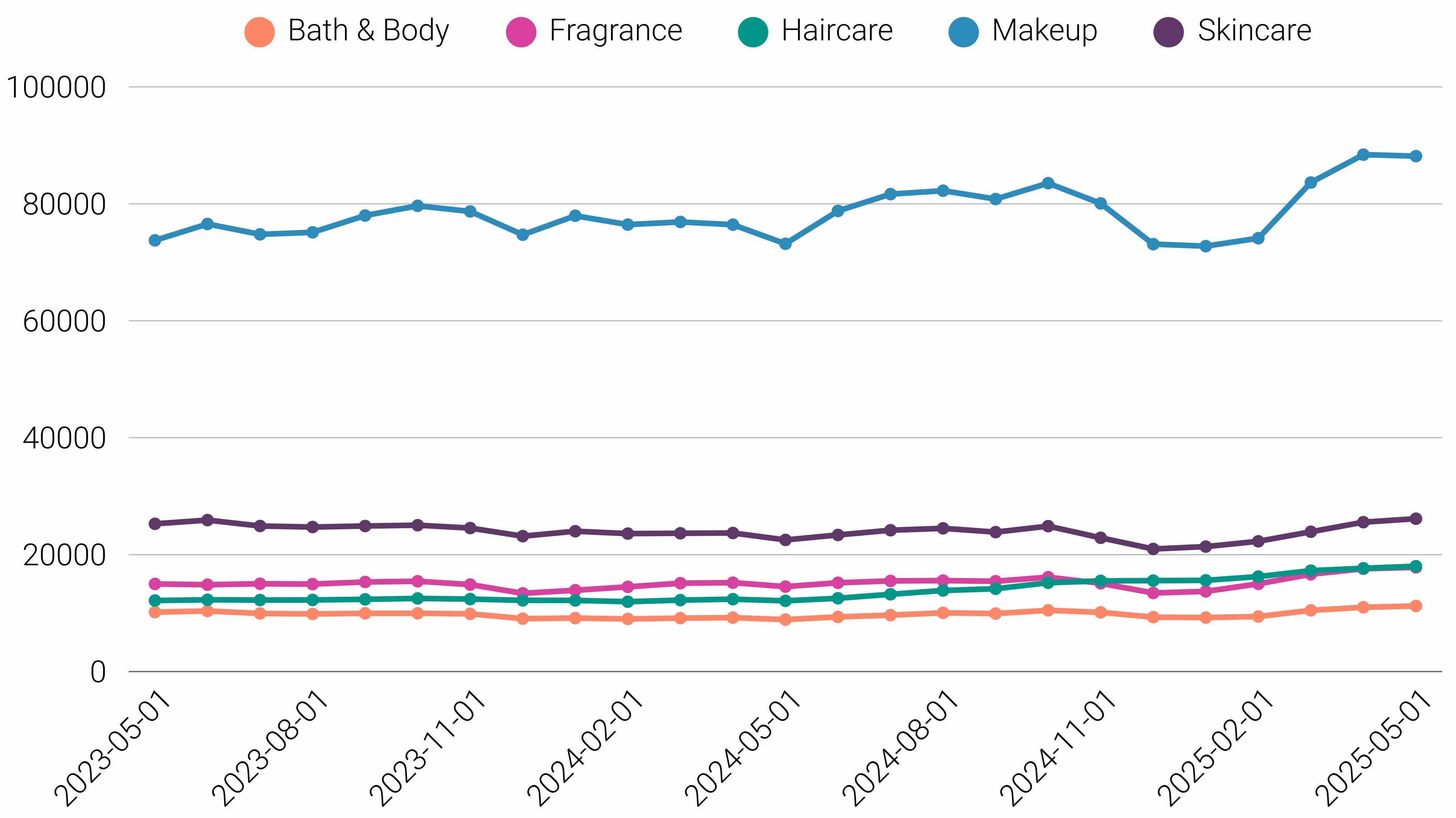
We're also seeing ingredient trends are breaking out of the usual floral script. Citrus, spice, woods, aquatics, and grounded, earthy notes are rising fast, highlighting a shift toward scents that feel intimate and personal rather than staged or overly polished. The category is moving away from traditional gender codes and leaning into mood, vibe, and emotional nuance.

The bottom line? Fragrance has evolved from an impulse buy to a ritual, more specifically a core expression of personal identity. For brands, it's no longer just a category; it's a strategic growth lever, with crossover potential extending into body care, candles, and home fragrance. Fragrance is steadily taking shelf space and cultural mindshare from every corner of beauty.

Category Growth & Pricing

Fragrance Is One of Beauty's Fastest YoY Growing Categories

- Fragrance now ranks fourth among beauty's core categories by total product count, edging ahead of bath and body and narrowing the gap with hair care.
- In May 2025, the average fragrance assortment across key retailers hit 17.8K SKUs, up from 14.5K the year prior, a 23% YoY increase.
- That growth outpaces both skincare (+16%) and bath and body (+26%), signaling a broader recalibration of the fragrance category. Only haircare grew at a rate of +49%, driven by its ongoing surge in scalp health.
- The growth suggests that fragrance is shifting from a niche add-on to a standalone strategy. With fragrance increasingly tied to ritual, mood, and personal narrative, expect this category to continue occupying more shelf space and emotional real estate in 2026.



Average Product Count (US) covers May 1, 2023 to May 1, 2025

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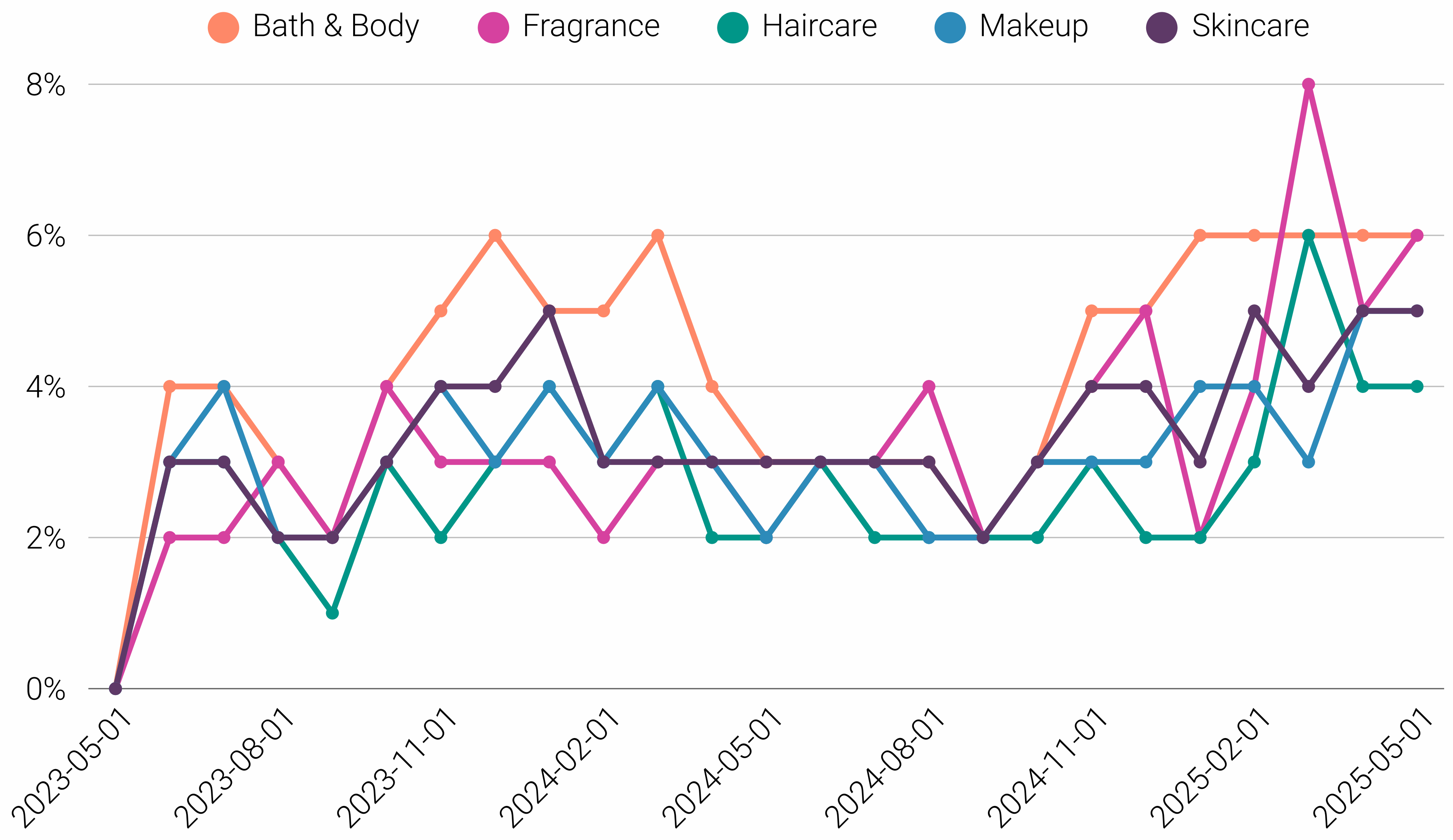
Product Growth Is Matched by Consumer Demand

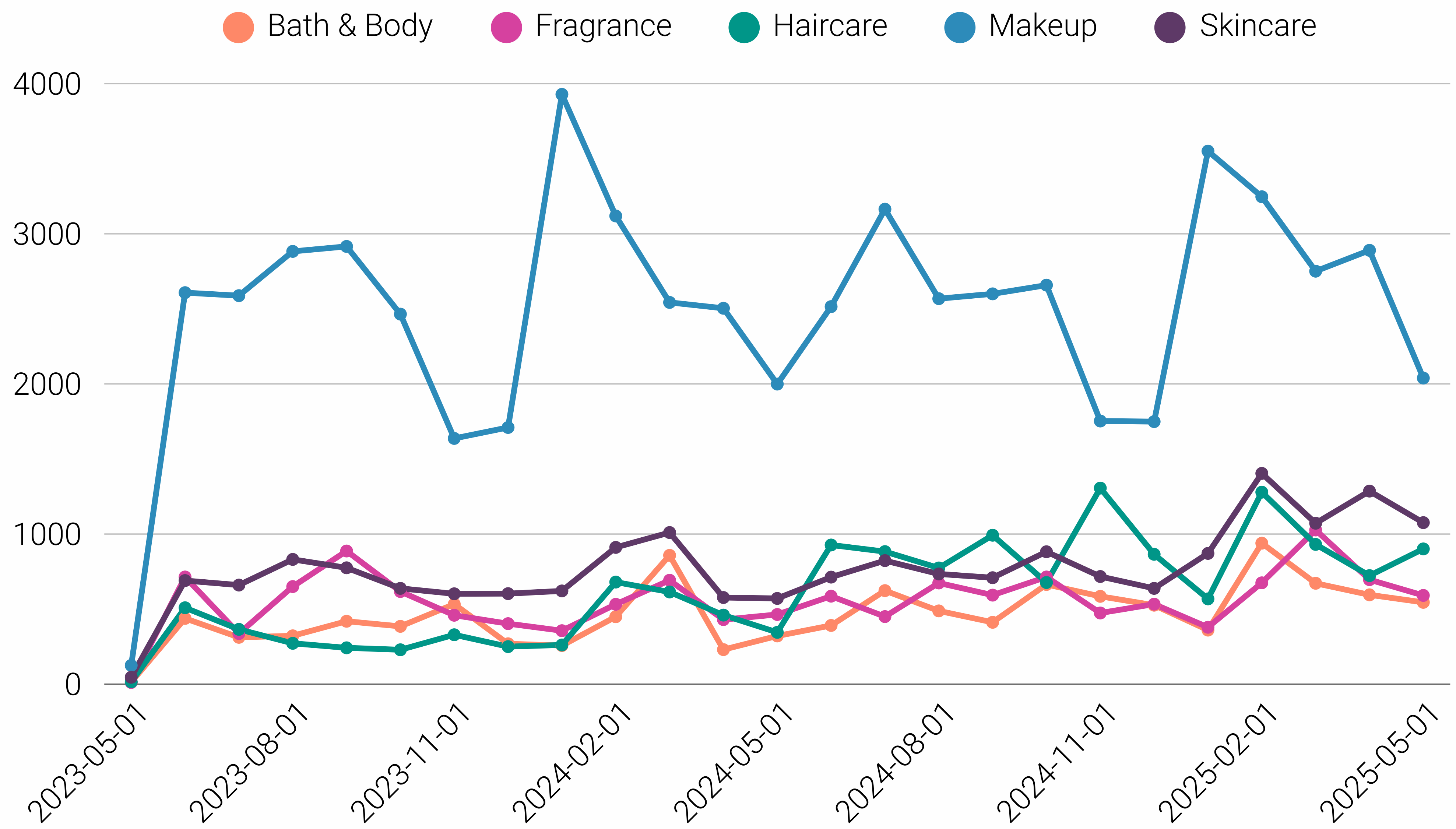
- In May 2025, 6% of all fragrance SKUs sold out, up from just 2% the same month last year. That translates to 1,196 SKUs sold out vs. 319, a 3.7x YoY increase in unit-level velocity.
- This spike in sell-out performance comes alongside a steady increase in total product count, suggesting a more calibrated supply chain and stronger brand/shopper alignment.
- Fragrance is becoming a higher-conversion category, where new launches don't just generate buzz, they drive actual sell-through.



Sold Out Product % (US) covers May 1, 2023 to May 1, 2025

A Wave of Newness Signals Brand Confidence

- New product introductions remain a key indicator of category health, and in May 2025, every major beauty segment saw significant innovation activity. Fragrance maintained its position as a top-tier innovation category, introducing 591 new SKUs, up from 464 in May 2024, +27% YoY.
- While makeup remains the leading category in total product introductions, its growth has plateaued. In contrast, fragrance continues to expand at a sustainable, strategic pace, reinforcing its role as a high-engagement, high-conversion category.
- Unlike function-first categories like skincare or haircare, fragrance relies on emotional resonance, storytelling, and olfactive distinctiveness. The increase in newness, paired with higher sell-through, suggests that brands aren't just launching more; they're launching better.
- With three consecutive quarters of 500+ new SKUs and sell-through rates on the rise, fragrance is proving it's resonating with shoppers.



Introduced Product Count (US) covers May 1, 2023 to May 1, 2025

Pricing Tiers Have Shifted Slightly

Price Architecture (US Market)

Date Range	Avg. Original Price	0-50	51-100	101-150	151-200	201-250	251-300	301-350	351-400	401-450	451-500	500+
01-Jan-24 to 30-Jun-24	$186.68 14.8K Avg. Products	1.8K |12%	2.6K |18%	3.5K |24%	2.4K |16%	1.1K |7%	992.2 |7%	596.9 |4%	641.1 |4%	280.8 |2%	264.6 |2%	493.1 |3%
01-Jan-25 to 30-Jun-25	$185.67 16.4K Avg. Products	2.4K |14%	2.6K |16%	3.8K |23%	2.8K |17%	1.3K |8%	1.1K |7%	658.0 |4%	773.7 |5%	376.9 |2%	274.1 |2%	498.2 |3%

Entry-Level

- Lowest price points ($0-50) grew two points, yet $51-100 shrunk
- Lower prices but higher emotional payoff (e.g., “signature scent,” “smells expensive”)
- Gaining visibility through TikTok virality and discovery sets

Prestige

- $151-250 grew by 2 points YOY
- Includes designer and niche-luxury crossovers
- Often features refillable formats and storytelling-forward packaging
- Shopper behavior is more intentional, often pre-researched and social proof-driven

Ultra-Luxe

- Mostly stable in price points, but $351-400 gained 1 point share
- Includes extrait concentrations, limited drops, and artisanal blends
- Rarely discounted and often sold through exclusive or brand-owned channels
- Positioned as aspirational purchases or collector pieces

Fragrance Is Emerging as a High-Growth Engine

Fragrance is no longer an indulgence. It's a strategic growth engine with behavior that points to long-term category leadership.

- +27% YoY increase in new product launches confirms fragrance is now a key innovation focus across beauty.
- +23% growth in average assortment size positions fragrance as a fast-scaling category, outpacing skincare and closely trailing haircare.
- Sell-out rate tripled YoY (2% → 6%), signaling that consumers aren't just browsing, they're buying.
- Fragrance now represents 17.8K active SKUs, surpassing bath and body and closing in on haircare in total volume.
- Balanced expansion across price tiers.
- Brands are launching smarter, not just more with longer shelf life and more alignment between product storytelling and consumer intent.

Brand Insights

Top Brands Introduced in 2025 By Specific Retailers

Ulta Beauty

- Noyz
- Ellis Brooklyn
- Octavia Morgan Los Angeles
- Dior
- Mugler
- Snif
- Gucci
- Carolina Herrera
- Dolce & Gabbana
- Jean Paul Gaultier

Sephora

- Phlur
- Huda Beauty
- Boy Smells
- Gucci
- Dolce & Gabbana
- Carolina Herrera
- Ellis Brooklyn
- Touchland
- Glossier
- Harlem Perfume Co.

Nordstrom

- Dries Van Noten
- Acqua Di Parma
- House Of Bo
- Dolce & Gabbana
- Escentric
- Boy Smells
- Gucci
- Chanel
- Phlur
- Chloe

Bluemercury

- Tom Ford
- Ellis Brooklyn
- Diptyque
- Vilhelm
- Sisley
- Sana Jardin
- Lake & Skye
- Heretic
- Parfums De Marly
- Vyrao

2025 data through July 25, 2025

Search Is Buzz

- While Baccarat Rouge 540 leads in raw interest with 358K monthly searches, its volume has plateaued. The real story is in those brands growing in search:
  - Gucci Guilty (+43%) and YSL Libre (+37%) are seeing double-digit growth, indicating a surge in consumer curiosity and likely strong digital visibility.
  - Le Labo (268K, +34%) and Creed Aventus (205K, +25%) continue to demonstrate strong appeal in the niche luxury segment.
  - Celebrity- and content-driven entries, such as Billie Eilish Perfume (200K, +22%) and Kayali (+23%), demonstrate the impact of social-first discovery.
- On the flip side, Chanel Perfume, despite a robust 106K in monthly searches, is down -19% YoY, a signal that heritage alone isn't enough to sustain digital demand without newness or cultural re-entry points.
- Brands seeing both strong absolute traffic and YoY gains are those actively investing in storytelling, influencer alignment, and cross-platform visibility. These are the names best positioned to scale heading into Holiday 2025.

Search Terms	Avg Monthly Search Volume	YOY Growth/Decline
Baccarat Rouge 540	358K	—
Le Labo	268K	+34%
Creed Aventus	205K	+25%
Billie Eilish Perfume	200K	+22%
Versace Parfum	167K	+7%
YSL Cologne	165K	+22%
YSL Perfume	142K	+8%
Miss Dior Parfum	150K	+32%
Victoria's Secret Scents	150K	+13%
Jimmy Choo Parfum	119K	+12%
Kayali Perfume	107K	+23%
Chanel Perfume	106K	-28%
YSL Libre	102K	+37%
Gucci Guilty	88K	+43%
Burberry Her	81K	+34%

May 2025 Search Data

Brand Case Study 1: Phlur

Fragrance with feelings. Phlur is rewriting the DTC playbook by leading with emotional storytelling and minimalist, mood-first marketing. It was announced recently that the brand would be acquired by private equity firm TSG Consumer Partners, so more growth is certainly on the horizon.

What's Driving Growth:

- Scents are designed as characters or experiences, not just compositions ("Missing Person," "Somebody Wood")
- Founder-forward branding (Chriselle Lim) adds authenticity and community-building power
- Discovery sets and minis allow for low-risk trial, especially among Gen Z

Performance Snapshot:

- Top SKU: Missing Person
- Price point: ~$96 for 50ml / $192 per 100ml equivalent
- Retailers: DTC, Sephora, Urban Outfitters

Insight: Emotional resonance drives performance. By pairing minimalist branding with maximalist storytelling, Phlur bridges the gap between niche and social-first.

Brand Case Study 2: Kayali

An influencer-led brand that's fragrance-first, not fame-first. Kayali blends Middle Eastern fragrance codes with Western sensibilities. It's an example of an influencer-led fragrance done with clear olfactive authority.

What's Driving Growth:

- Fragrance wardrobe positioning—scents are designed to layer and mix
- Rich storytelling + high-gloss visuals without alienating entry-level shoppers
- Strategically paced drops that align with gifting and seasonal moments

Performance Snapshot:

- Top SKU: Vanilla 28
- Price point: ~$100 for 50ml / $200 per 100ml equivalent
- Retailers: Sephora, Huda Beauty, Cult Beauty

Insight: Kayali proves influencer-led fragrance can scale—when it leads with product integrity, not just personality.

Brand Case Study 3: Byredo

The art-world darling of niche fragrance, Byredo fuses olfactive minimalism with creative maximalism—positioning itself as both luxury and culture.

What's Driving Growth:

- Strong brand aesthetic across scent, packaging, and campaigns
- Consistent presence on both top-introduced and top-sellout lists
- Expands beyond fragrance creating a full-scent lifestyle
- Appeals to both seasoned luxury buyers and new entrants

Performance Snapshot:

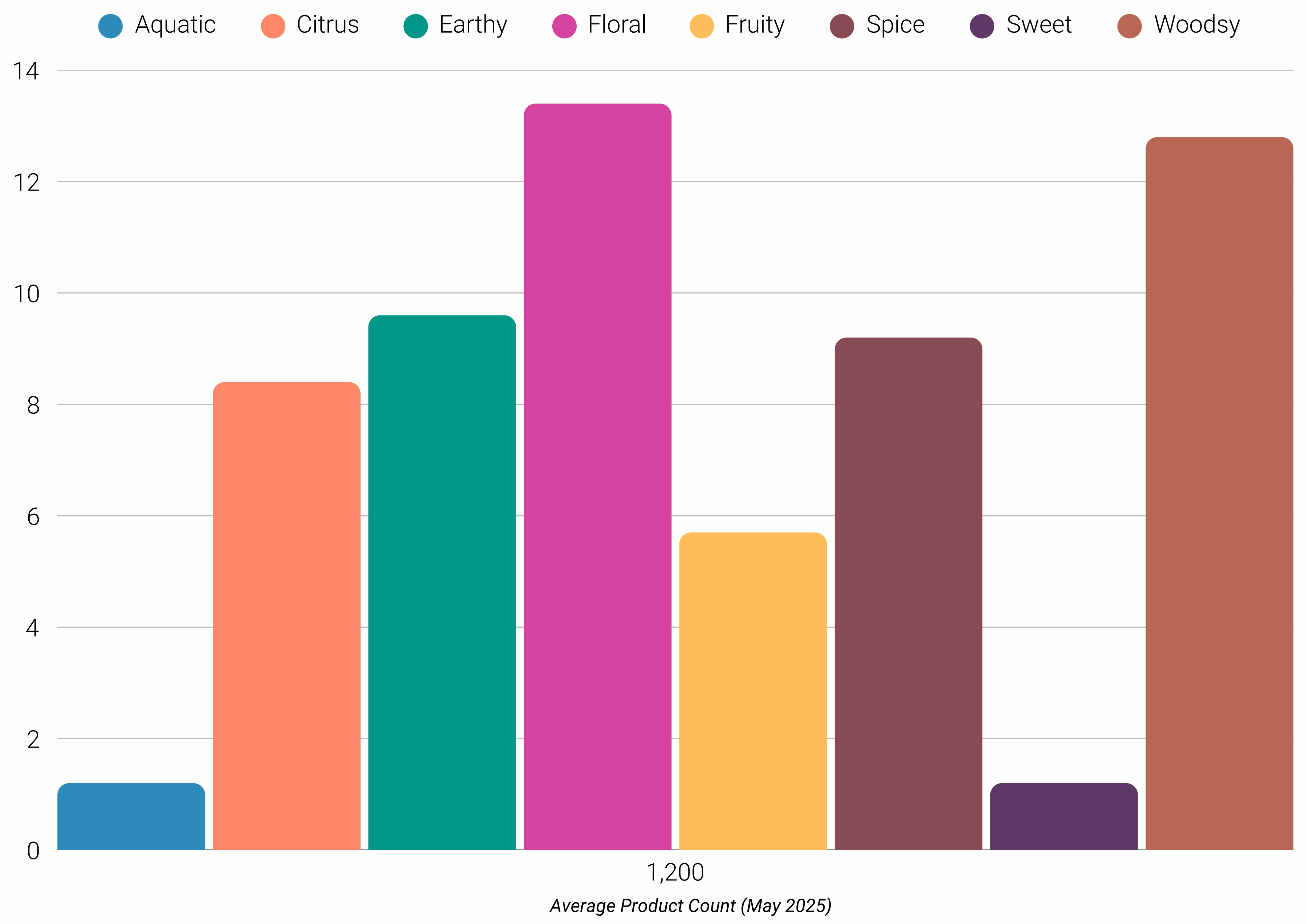
- Top SKU: Mojave Ghost
- Price point: ~$205 per 100ml
- Retailers: DTC, Barneys (archive), Violet Grey, Nordstrom

Insight: Byredo maintains niche prestige at scale by staying visually and conceptually sharp across every touchpoint.

Fragrance Notes

Fragrance Families on the Rise

- Fragrance families that evoke freshness, subtle sweetness, or natural grounding are gaining traction in 2025. This chart reflects current market saturation, but the real momentum lies in how quickly certain families are growing year over year.
- While floral (13.4K SKUs) and woody (12.8K SKUs) families still dominate by volume, emerging consumer interest is visible in faster-growing categories:
  - Aquatic scents climbed +31% YoY (918 → 1.2K SKUs), tied to escapism and coastal energy.
  - Sweet notes rose +30%, fueled by vanilla, honey, and nostalgic gourmand themes.
  - Spicy and earthy notes also saw strong double-digit growth, connected to grounding rituals and emotional depth.
  - Even fruity and citrus families, often dismissed as mass or seasonal, posted solid gains, suggesting broader olfactive flexibility.



Notes to Watch: Launches Defining the Trend

These launches reflect a strategic alignment between note-level growth and cultural relevance.
Brands are leaning into mood-matching, layering potential, and multi-format expansion to anchor their scent storytelling:

Search Terms	Average Product Count (US) May 2024	Average Product Count (US) May 2024	YoY Growth	Q2 2025 Launch to Note
Aquatic	918	1200	+31%	Sol de Janeiro – Agua Mistica
Sweet	924	1200	+30%	Phlur – Vanilla Smoke Body Mist
Spices	7200	9200	+28%	Byredo – Rouge Chaotique
Fruity	4500	5700	+27%	Billie Eilish – Eilish No. 2
Earthy	7700	9600	+25%	DS & Durga – Brown Flowers
Woods	10300	12800	+24%	Tom Ford – Le Male Elixir Absolu
Floral	11100	13400	+21%	Kayali – Fleur Majesty Rose Royale
Citrus	7100	8400	+18%	Jones Road – BKLYN by Bobbi Brown

Market Focus

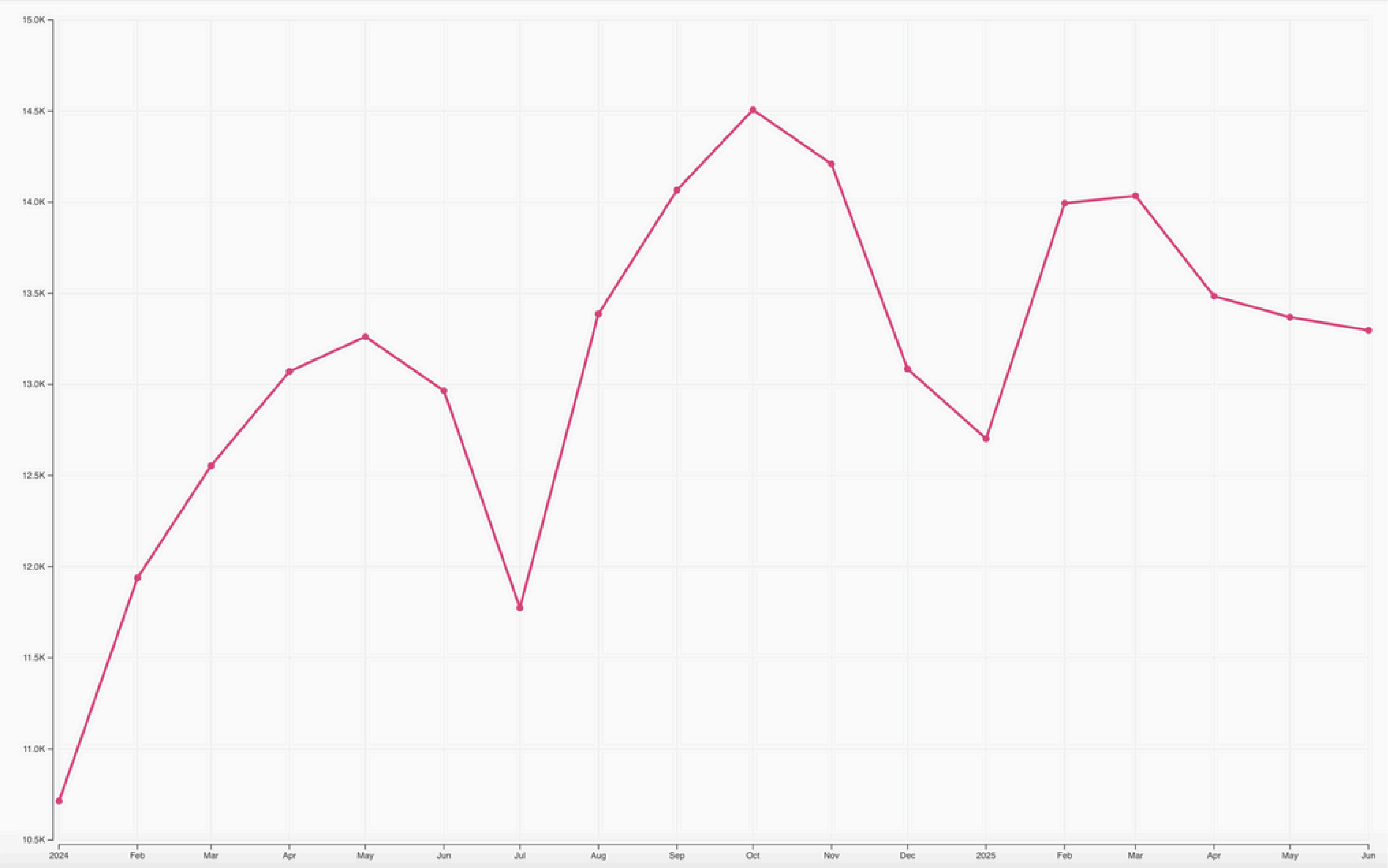
UK Market Focus

Price Architecture (UK Market)

Date Range	Avg. Original Price	0-50	51-100	101-150	151-200	201-250	251-300	301-350	351-400	401-450	451-500	500+
01-Jan-24 to 30-Jun-24	£148.03 12.4K Avg. Products	1.7K |14%	3.9K |32%	3.0K |24%	1.3K |11%	1.1K |9%	592.5 |5%	301.7 |2%	162.8 |1%	100.5 |1%	52.5 |0%	219.2 |2%
01-Jan-25 to 30-Jun-25	£143.90 13.5K Avg. Products	2.1K |16%	3.7K |27%	3.5K |26%	1.4K |11%	1.1K |8%	852.4 |6%	319.4 |2%	187.8 |1%	133.6 |1%	60.9 |0%	171.2 |1%

- Average prices for fragrance in the UK market have decreased slightly - by 3% during the past 6 months.
- But within price ranges, interesting themes have emerged, where the lowest priced fragrances (0-50) have gained 2 points share, and slightly more premium fragrances priced (101-150) have also gained two points share.

- Fragrance availability has varied somewhat over the past months. Availability peaked in October, then dropped during the holiday season. Availability picked back up after the new year, but has been on a declining trend since April.
- Compared to June 2024, product counts in June 2025 are up 3%, indicating that retailers are still investing in the category. However, the modest growth suggests a deceleration in momentum, signaling that while interest remains, the rapid expansion seen in previous periods may be tapering off.



Average Product Counts

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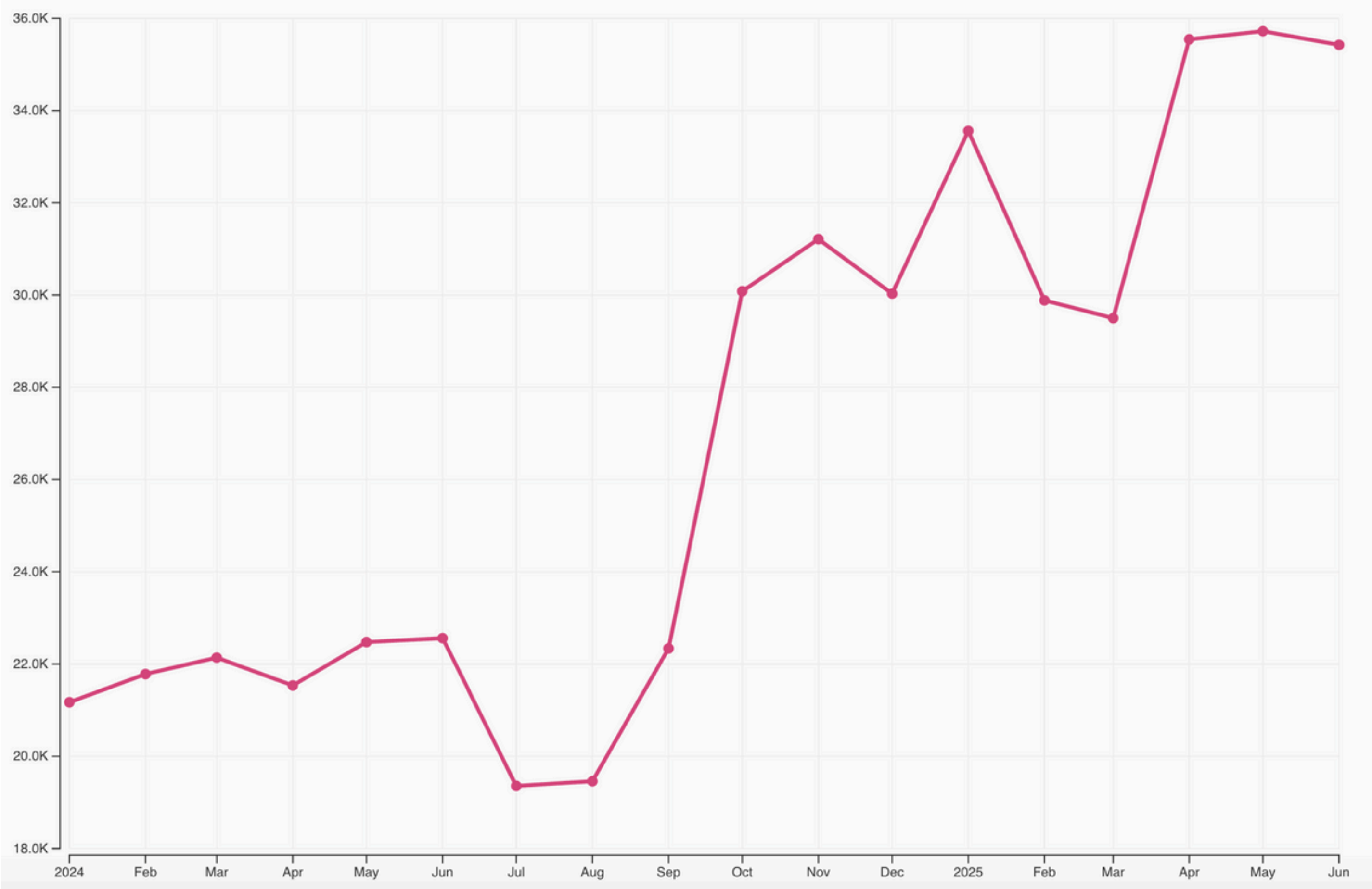
UAE Market Focus

Date Range	Avg. Original Price	0-100	101-200	201-300	301-400	401-500	501-600	601-700	701-800	801-900	901-1000	1000+
01-Jan-24 to 30-Jun-24	AED 564.22 21.9K Avg. Products	4.3K |20%	2.3K |10%	1.8K |8%	2.2K |10%	2.2K |10%	1.8K |8%	1.5K |7%	954.1 |4%	880.7 |4%	792.6 |4%	3.3K |15%
01-Jan-25 to 30-Jun-25	AED 465.75 32.7K Avg. Products	8.3K |26%	5.4K |17%	3.0K |9%	2.5K |8%	2.3K |7%	2.2K |7%	1.8K |5%	1.2K |4%	954.4 |3%	818.3 |3%	4.1K |13%

- Average prices dropped by 17% this year, compared to the same period last year.
- The price bands where we saw the most change were the lowest price points (0-200), and the highest price points (1000+) lost 2 points share YOY.

- Growth in fragrance has been significant over the past year-and-a-half, and Noon has been one of the major retailers driving this increase in product counts.
- The last three months have seen peak product counts for fragrances in the UAE; interestingly, product counts dropped during the Ramadan holiday (between February-March)



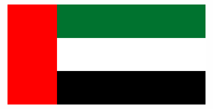
Top Brands

Introduced

- Zara
- Huda Beauty
- Gucci
- Guerlain
- Dior
- Acqua Di Parma
- Jo Malone
- Paco Rabanne
- Saint Laurent
- Hermes

Sold Out

- Zara
- Dior
- Chanel
- Frederic Malle
- Xerjoff
- Kilian
- Huda Beauty
- Dolce & Gabbana
- Tom Ford
- Hermes



Introduced

- Lattafa
- Parfumix
- The Rupawat Perfumery House
- Demeter
- Maison Alhambra
- Afnan
- Saint Laurent
- Armani
- Prz
- Ard Al Zaafaran

Sold Out

- Lattafa
- Guerlain
- Zara
- Dior
- Armani
- Xerjoff
- Paco Rabanne
- Chanel
- Dolce & Gabbana
- Ahmed Al Maghribi

2025 data through July 25, 2025

Strategic Opportunities & Watchlist

Breaking In: How Challenger Brands Can Enter the Fragrance Space

Own the Origin Story. Challenger brands should lead with founder POVs or emotion-first concepts (e.g., scents for anxiety, sleep, sensuality).

Start Small, Sample Big. Full-size launches can be risky and expensive. Start with discovery sets or minis to let consumers opt in before committing.

Win the First Scroll. Social media is redefining how people discover fragrance. Brands need highly visual storytelling to cut through algorithm fatigue.

Don’t Launch Alone. Collaborations with established creators, niche influencers, or unexpected categories give brands instant credibility.

Where Fragrance Goes Next: Whitespace & Watchlist

Fragrance tied to emotional benefit (e.g., grounding, focus, calm) is gaining ground—but often lives in wellness, not prestige. There's white space for a brand that blends clinical efficacy with olfactive beauty.

Scent is no longer confined to the bottle. The most forward-thinking brands are expanding into hair mists, deodorants, candles, and textiles, making fragrance part of the full self-expression ritual.

The next generation isn’t buying their mother’s bottle. There’s an opportunity to create fragrance identities tailored to Gen Z values: identity fluidity, sensory minimalism, and online-first discovery.

Shoppers want to try before they commit. Brands offering layering sets, minis, or experiential packaging (peel-away, QR storytelling, scratch & sniff) win trust early—and scale faster.

Analyze Your Beauty Assortment Today!

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