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# Personal Fragrance Trends

A look at the trends influencing fragrance design  
and innovation.

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# Introduction

Many North American consumers view non-essential personal care – including fragrances - as an affordable luxury, with these products seeing strong growth in 2023 and 2024. A recent GlobalData survey found that high spending is holding steady while both low and medium spending are seeing slight increases, benefitting the personal fragrance category. Premium fragrances continue to outperform mass, and premium brands have an opportunity to tap into consumers' desire for high-quality products and unique experiences. Consumers purchase fragrances to both replenish current products and explore new scents and brands.

This report outlines a few trends that can help brands win with today's personal fragrance consumers.

*\*The brands mentioned in this report are trademarks of their respective owners. Inclusion of these brands in this report is not meant to imply an association with or endorsement from the respective trademark owners.*



# Skinification

Skin health is becoming a primary consideration across personal and beauty care categories, with skincare ingredients, benefits, and functionality becoming essential to consumers, even in non-skin care products. While personal fragrance brands are beginning to talk about skin health and introducing skincare claims, this is still an under-penetrated space with great opportunity. Euromonitor notes, “the fastest-growing claims include ‘non-irritating,’ ‘hypoallergenic,’ and ‘no allergens’ claims, but consumers knowledgeable about skin care will likely demand more substantiated, specific claims in the future, such as ‘dermatologically-tested.’” There are opportunities for brands to introduce products for sensitive skin and innovate with new formulations like hydrating and microbiome-friendly fragrances. Brands are also launching new formats, including solid fragrances made without alcohol and hair fragrances that add scent to the hair without interacting with the skin.

**“Fragrance brands that can substantiate skin health claims and proven results will win in this under-penetrated space.”  
(Euromonitor)**

Many consumers associate minimal package design with premium or “clean” products that use higher quality or fewer ingredients. Uncluttered label design can reinforce that a fragrance is safe for sensitive skin or doesn’t include irritating ingredients. Fewer graphic elements can also allow for clear communication of skin-forward claims and benefits. As fragrance brands look to expand their portfolio to include new product formats and formulations, Berlin Packaging is well suited to source a variety of packaging styles to meet every need. With over 1,700 partners around the globe, we can find the perfect package for any perfume, hair spritz, solid fragrance, and more.







# Functional Fragrances

As holistic health and wellness have become a priority for consumers, functional fragrances that benefit emotional well-being have begun gaining traction. According to Euromonitor, “Fragrances have always offered a sensory experience that connects the consumer with emotions, but [they] have increasingly morphed into coping mechanisms/routines to handle stress.” Fragrance brands are incorporating ingredients that benefit mind and mood, including those that relieve stress, improve focus (i.e. Firmenich’s Focus powered by EmotiCODE™), and promote sleep. Euromonitor adds, “The product innovation pipeline of fragrances has ample room to incorporate more science-backed evidence, neuroscience, and AI to develop emotionally functional fragrances.” They note that as consumers seek more sophisticated and scientific results, fragrances may transition away from aromatherapy toward aromachology, which studies the influence of odors on human behavior, feelings, and emotions. DSM-Firmenich has EmotiON, an emotions-based research program that explores claims, colors, ingredients, and olfactive cues to target a specific emotional territory.

“Stress relief” and “energy boosting” are, respectively, the third-and fourth-placed fragrance claims globally. (Euromonitor)

Custom packaging that has added functionalities or promotes an elevated user experience can help support self-care and emotional wellbeing. This can include convenience features, premium aesthetics, or sustainable attributes. According to Mintel, 68% of consumers agree that doing things that help the environment makes them feel happy. Secondary packaging can also tap into consumers’ emotions and create moments of delight. Berlin Packaging’s expert design teams create special secondary packaging solutions that build excitement and anticipation through premium materials and finishes, unexpected details, and surprise elements.



# Sustainability

Sustainability impacts almost every consumer packaged goods category, and personal fragrances are no exception. According to Euromonitor's Product Claims and Positioning tracker, fragrances with sustainability-related claims such as "natural," "vegan," and "from recycled materials" saw the highest growth in SKU count between 2021 and 2023. Upcycling is gaining momentum within the fragrance industry, expanding from niche companies to mass-market brands. Nina Ricci Nina Le Parfum uses entire upcycled lemons (including the zest, juice, and skin) that fruit markets have rejected. Eco-consciousness is also paving the way for waterless or water-saving perfumes, including solids and oil-based products.

**16% of global respondents said that sustainably sourced fragrance ingredients influenced them to purchase in 2024, up from 13.5% in 2023. (Euromonitor survey)**

Euromonitor projects a 33% CAGR in fragrance SKUs with "sustainable packaging" attributes. Berlin Packaging helps customers find or create eco-friendly primary and secondary packaging solutions. Our sustainability team conducts lifecycle analyses (LCA) to help our customers quantify their product's environmental impact over the course of its entire lifecycle. With LCAs, we can calculate a product's environmental footprint, including its carbon footprint (greenhouse gas emissions) and water, mineral resources, and fossil fuel use. Our LCA tool has helped many customers balance sustainability with brand positioning, performance, and functionality.







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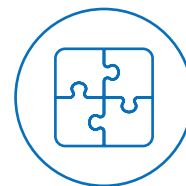
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