

## Fragrances - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



After several years of weak performance, the \$3.8 billion US fragrance market continues to see sales slide, especially in the women's fragrance segment.

This report looks at the following areas:

- Sales decline in 2017 as the market continues to face challenges
- Declines steepest in women's fragrance segment
- Penetration is high, but usage is irregular

Heavy competition within and beyond the category has resulted in slow category growth. Despite these challenges, interest is solid in natural fragrances, customized options, and fragrances with added benefits. Online tools, apps, and fragrance testing technologies offer additional opportunities for innovators in the category.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Fragrances - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Definition

### Executive Summary

The issues

Sales decline in 2017 as the market continues to face challenges

Figure 1: Total US sales and fan forecast of fragrance market, at current prices, 2012-22

Declines steepest in women's fragrance segment

Figure 2: Usage of personal body care products with or instead of fragrances, by men and women aged 18-34, May 2017

Penetration is high, but usage is irregular

Figure 3: Regular and any usage of fragrances, May 2017

The opportunities

Young adults show high engagement in the segment

Figure 4: Regular and any usage of any fragrance (net), by age, May 2017

Interest in added benefits could encourage more regular usage

Figure 5: Interest in fragrances with added benefits, by men and women aged 18-34, May 2017

Innovations excite younger users

Figure 6: Interest in product innovations, by men and women aged 18-34, May 2017

What it means

### The Market – What You Need to Know

Sales decline in 2017, with market slated to shrink through 2022

Smaller men's fragrance segment outperforms women's

The majority of fragrance sales are through "other" retail channels

Scented personal care products compete with fragrances

Engagement among younger adults key to growth

### Market Size and Forecast

Sales decline in 2017 as market continues to face challenges

Market is projected to see declines through 2022

Figure 7: Total US sales and fan forecast of fragrance market, at current prices, 2012-22

Figure 8: Total US sales and forecast of fragrance market, at current prices, 2012-22

### Market Breakdown

Decline in sales steeper in women's fragrance segment than in men's

Figure 9: Share of fragrance market sales, by segment, 2017

Figure 10: Total US retail sales of fragrances, by segment, at current prices, 2015 and 2017

Figure 11: Total US retail sales and forecast of fragrances, by segment, at current prices, 2012-22

The majority of fragrance sales are through "other" retail channels

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Fragrances - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 12: Total US retail sales of fragrances, by segment, at channel, 2015 and 2017

## Market Perspective

Scented personal care products compete with fragrances

Figure 13: Regular and any usage of scented personal care products, May 2017

Scented body care is especially appealing to key fragrance consumers

## Market Factors

Engagement among younger adults key to growth

Figure 14: US population 18+, by age, 2012-22

Younger consumers are more diverse, multicultural

Figure 15: Hispanic share of population, by generation, 2017

Figure 16: Population by race and Hispanic origin, 2012-22

## Key Players – What You Need to Know

In crowded landscape, a range of diverse players

Fragrances compete with original scents, unique inspirations, unexpected packaging

Natural ingredients, eco-friendly packages appeal to core users

Celebrity-endorsed and traditional floral fragrances struggle

Looking forward, customization, online retailing, and technology

## Brand Overview and Usage

Coty and Elizabeth Arden have strong presence within beauty market

L'Oréal and Estée Lauder hold broad portfolios

Parlux Fragrances is a leading supplier of celebrity fragrances

Unilever's Axe and P&G Old Spice lead mass brands for men

L Brands offers exclusive brands through specialty stores

Specialty store perfume brands are most widely purchased

Figure 17: Usage of perfume in the past 12 months - format and brand, by gender, Winter 2017

Mass brands Old Spice and Axe top aftershave/cologne brands

Figure 18: Usage of cologne/aftershave in the past 12 months – format and brand, by gender, Winter 2017

## What's Working?

Designer scents leverage connections with luxury

Figure 19: Mr. Burberry ad, April 2016

Differentiation via scent inspirations and standout packaging

Original fragrance inspirations connect to art, culture, nature, and science

Gourmet inspired scents drive innovation

Original and surprising packaging

Unique formats spark interest

Natural, skin-safe, and eco-friendly brands evoke simplicity

Unisex products and gender ambiguity are trending

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Fragrances - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### What's Struggling?

Traditional women's fragrances are struggling to reach younger shoppers  
 Negative perceptions lead to struggle of celebrity fragrances

### What's Next?

Customization moves into the mainstream  
 Technology enhances the shopping process  
 Primers to extend scent

### The Consumer – What You Need to Know

Penetration is high, but regularity of usage weakens the market  
 Fragrance retail landscape is fragmented, age and gender shape choice  
 Interest in added benefits is solid, could shape innovation  
 Specialty, designer, and celebrity brands have distinct associations  
 Mood, season, and time of day shape usage, especially for younger women  
 Concerns relate to safety, choice, and challenges of testing fragrances  
 Moderate interest in natural formulations and customized products

### Fragrance Usage

High overall penetration, even as inconsistent usage undercuts sales  
 Figure 20: Any use (net) and regular use (net) of fragrances, May 2017

Higher-income adults are least likely to use fragrance  
 Figure 21: Regular use (net) of fragrances and any scented personal care, by household income, May 2017

Younger men are most likely to use fragrance regularly  
 Figure 22: Regular use (net) of any fragrance and any scented personal care product, by age and gender, May 2017

Younger men show strong usage of travel and alterative sizes  
 Figure 23: Regular use (net) of fragrances, by age and gender, May 2017

Multicultural adults stand out for high usage of fragrances  
 Figure 24: Regular usage (net) of fragrances, by race and Hispanic origin, May 2017

### Retailers Shopped

Fragrance retail market is highly fragmented  
 Figure 25: Retailers shopped, May 2017

Affluent favor department stores, less affluent shop mass merchandisers  
 Figure 26: Retailers shopped, by household income, May 2017

Men favor mass merchandisers, women specialty retailers  
 Figure 27: Retailers shopped, by age and gender, May 2017

### Interest in Added Benefits

Moderate interest in added benefits  
 Figure 28: Interest in fragrances with added benefits, May 2017

Moisturizing and deodorizing claims yield maximum reach

**BUY THIS  
 REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Fragrances - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 29: TURF analysis – Interest in fragrances with added benefits, May 2017

Figure 30: Table – TURF analysis – Interest in fragrances with added benefits, May 2017

### Methodology

Younger consumers show high interest in added benefits

Figure 31: Interest in fragrances with added benefits, by age and gender, May 2017

Interest in added benefits higher for Hispanics

Figure 32: Interest in fragrances with added benefits, by race/Hispanic origin, May 2017

### Brand Perceptions

Different types of brands hold distinct associations for consumers

Figure 33: Correspondence analysis – Brand perceptions, May 2017

Correspondence analysis methodology

Figure 34: Brand perceptions, May 2017

Younger adults report stronger perceptions toward range of brands

Young adults hold polarized views of celebrity fragrances

Figure 35: Perceptions of celebrity branded fragrances, by age and gender, May 2017

Women aged 18-34 view specialty beauty brands as high value fun

Figure 36: Perceptions of speciality beauty brand fragrances, by age and gender, May 2017

Men aged 18-34 see designer fragrances as high quality and high value

Figure 37: Perceptions of designer brand fragrances, by age and gender, May 2017

### Attitudes toward Fragrance Usage

Season and time of day can shape fragrance choice and usage

Mood and feelings are also integral to product choice

Figure 38: Attitudes toward fragrance usage, May 2017

Women are most likely to vary fragrance usage

Figure 39: Attitudes toward usage of fragrances, by age and gender, May 2017

Black and Hispanic consumers more likely to vary usage

Figure 40: Select attitudes toward fragrance usage, by race/Hispanic origin, may 2017

### Attitudes toward Safety and Efficacy

Challenges and concerns relate to scent testing, duration, and safety

Figure 41: Attitudes toward safety and efficacy, May 2017

Gender and age shape attitudes in selecting and testing fragrances

Figure 42: Attitudes toward safety and efficacy, by age and gender, May 2017

### Product Innovations

Interest in innovations is moderate

Figure 43: Interest in product innovations, may 2017

Young women want natural, organic, and skin-safe fragrances...

...but are enthusiastic about a range of innovations

Figure 44: Interest in select innovations, by age and gender, may 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Fragrances - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Blacks and Hispanics over index for a wide range of innovations

Figure 45: Interest in select product innovations, by race/Hispanic origin, May 2017

### Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Terms

### Appendix – The Market

Figure 46: Total US sales and forecast of fragrance market, at inflation-adjusted prices, 2012-22

Figure 47: Total US retail sales and forecast of fragrances by channel, at current prices, 2012-17

### Appendix – Key Players

Figure 48: MULO sales of fragrances, by leading companies, rolling 52 weeks 2016 and 2017

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)