

Decoding next-gen Fragrance Brands

All maps are wrong; some are useful

Brand maps are an long established tool for marketeers to analyze competition. Like every single map in the world, they're wrong by definition. But they're still helpful. They reduce complexity and help us to see bigger patterns.

For our design maps, we systematically analyze design elements in markets and put them on a map. We scan hundreds of websites, social media assets and products to identify patterns and connect the dots.

Positioning brands in crowded markets is an art. Zooming out helps us to identify success patterns and potential niches.

But in every map also lies some insight on other markets and society in general. Successful brands are a reflection of people's needs. Analyzing brands systematically shows us what moves consumers and resonates in society. Every design map of innovative markets therefore also provides a new perspective on zeitgeist.



Niche brands on the rise with distinctive fragrance experiences.

In the world of perfume, niche fragrance houses aren't exactly a new thing. Throughout history, there have always been artisans who have cherished and perfected the art of encapsulating scents. A few still exist today.

It was the 20th century, however, which capitalized on the idea of fragrant self-expression, and designers from the fashion, jewelry, or accessories industries became the big shots, hogging the limelight.

After a phase of relentless campaign-driven, celebrity-heavy marketing and one-size-fits-all products, the market cried out for something more unique and tailored.

That's when newcomers like Byredo and Le Labo entered the arena with their minimalist and relatable aesthetic. With social media on the rise, they made their way into the mainstream, paving the road for others to follow. Today, the number of next-gen fragrance houses continues to grow, all about giving customers fresh ways to express themselves through scent.

In a world where having an online shop is a must and getting retail space is tough, we're intrigued by how niche perfume brands are making a name for themselves online, even though you can't (yet) smell their products through a screen.

"In the age of digital beauty, your personal scent becomes the singular mystery that can't be perceived through a screen. To know someone's scent is to truly know them – it's the ultimate intimacy in the age of online."
-Dazed

We decoded design patterns of 20+ next generation fragrance brands

Logo	Brand name	Founding year	Headquarters
R O ^ D S	Roads	2013	Ireland
PHLUR	Phlur	2014	United States
THOMAS KOSMALA	Thomas Kosmala	2014	United Kingdom
UNE NUIT NOMADE	Une Nuit Nomade	2015	France
PERFUMER H	Perfumer H	2015	United Kingdom
STORA SKUGGAN	Stora Skuggan	2015	Sweden
Atl. OBLIQUE	Atl. oblique	2016	Germany

Logo	Brand name	Founding year	Headquarters
Saint d'Ici	Saint d'Ici	2016	South Africa
M A Y A N J I E	Maya Njie	2016	Sweden
bdk P A R F U M S	bdk Parfums	2016	France
SON VENİN EAU DE PARFUM	Son Venin	2016	Norway
X I N Û	Xinú	2016	Mexico
19-69	19-69	2017	Sweden
Fischersund	Fischersund	2017	Iceland

The Brands

Logo	Brand name	Founding year	Headquarters
WHO IS ELIJAH	Who is Elijah	2018	Australia
Maison <i>Crivelli</i>	Maison Crivelli	2018	France
ORMAIE PARIS	Ormaie	2018	France
HENRY ROSE	Henry Rose	2019	United States
Roelen	Roelen	2019	Germany
Liis	Liis	2020	United States

Logo	Brand name	Founding year	Headquarters
*Apartment.	*Apartment	2020	South Africa
BO	Bo	2021	United States
NI NISSABA	Nissaba	2021	Switzerland
Gabar	Gabar	2021	Myanmar
Vyrao	Vyrao	2021	United Kingdom
BIBBI PARIS	Bibbi	2023	Sweden

The visual landscape of fragrance brands

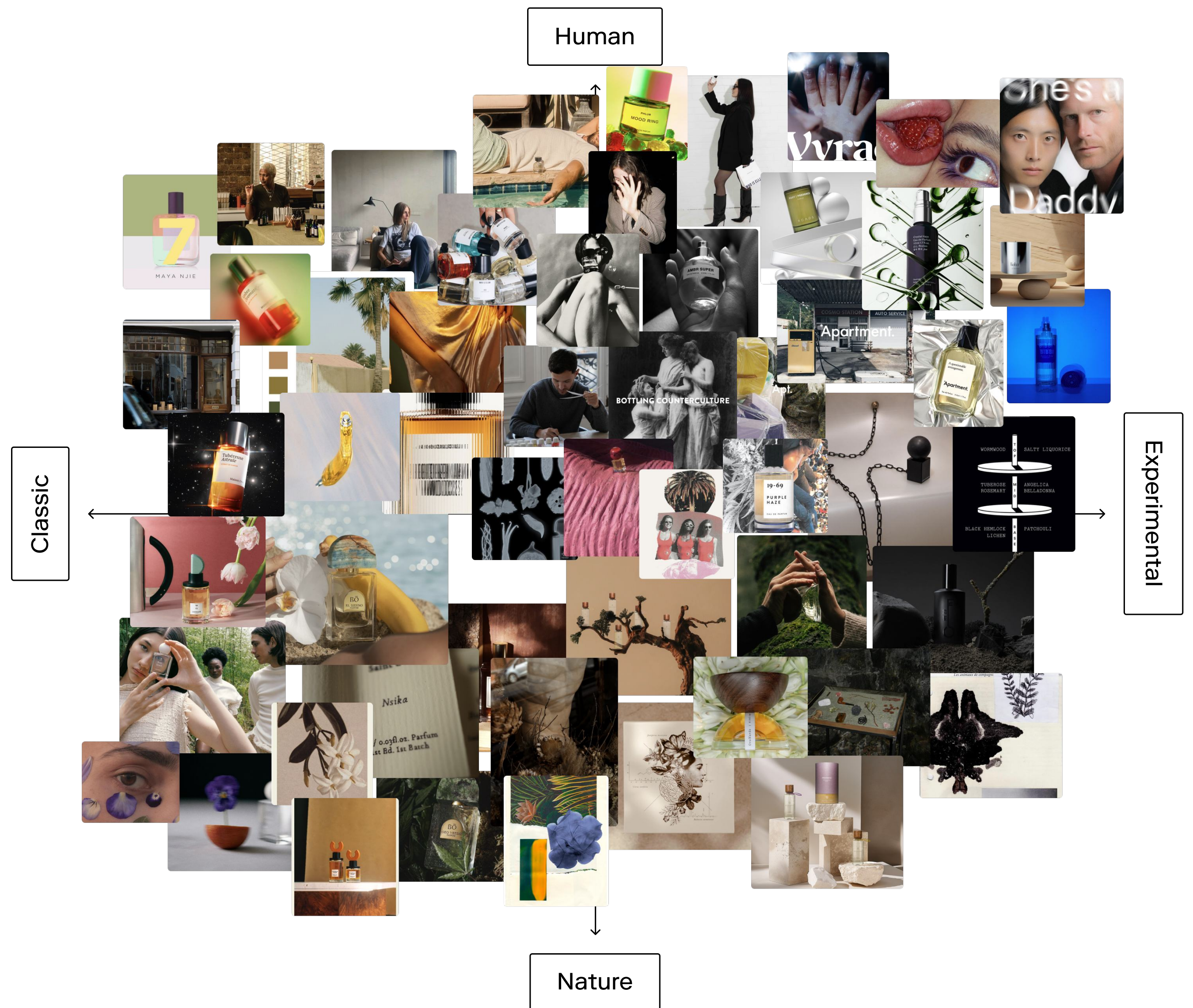
In the vibrant world of fragrance brands, a fundamental question resonates deeply: What inspires you? What truly reflects your essence?

Are you someone who embraces the latest trends, seeks timeless elegance, or craves a connection with nature? As we explore this question, let us consider how these motivations are intertwined.

While the marketing formula of traditional designer brands is rather unpopular, some niche houses recognize the allure of drawing inspiration from their essence. They infuse their designs with elegance and simplicity, reimagining the classics while staying grounded in authenticity—the faces behind the product, the artisans themselves.

On the other end of the spectrum lie the mavericks, the artisans who defy conventions, who experiment and provoke. They leave behind the conventional aesthetics and push the boundaries of their craft. Their journey leads them to uncharted territories, where experimentation reigns supreme.

Through the visual landscape, we explore how each brand carves out its own space, shaping the narrative of niche perfumery in today's ever-evolving landscape.



Brand map

- ### Memoirists

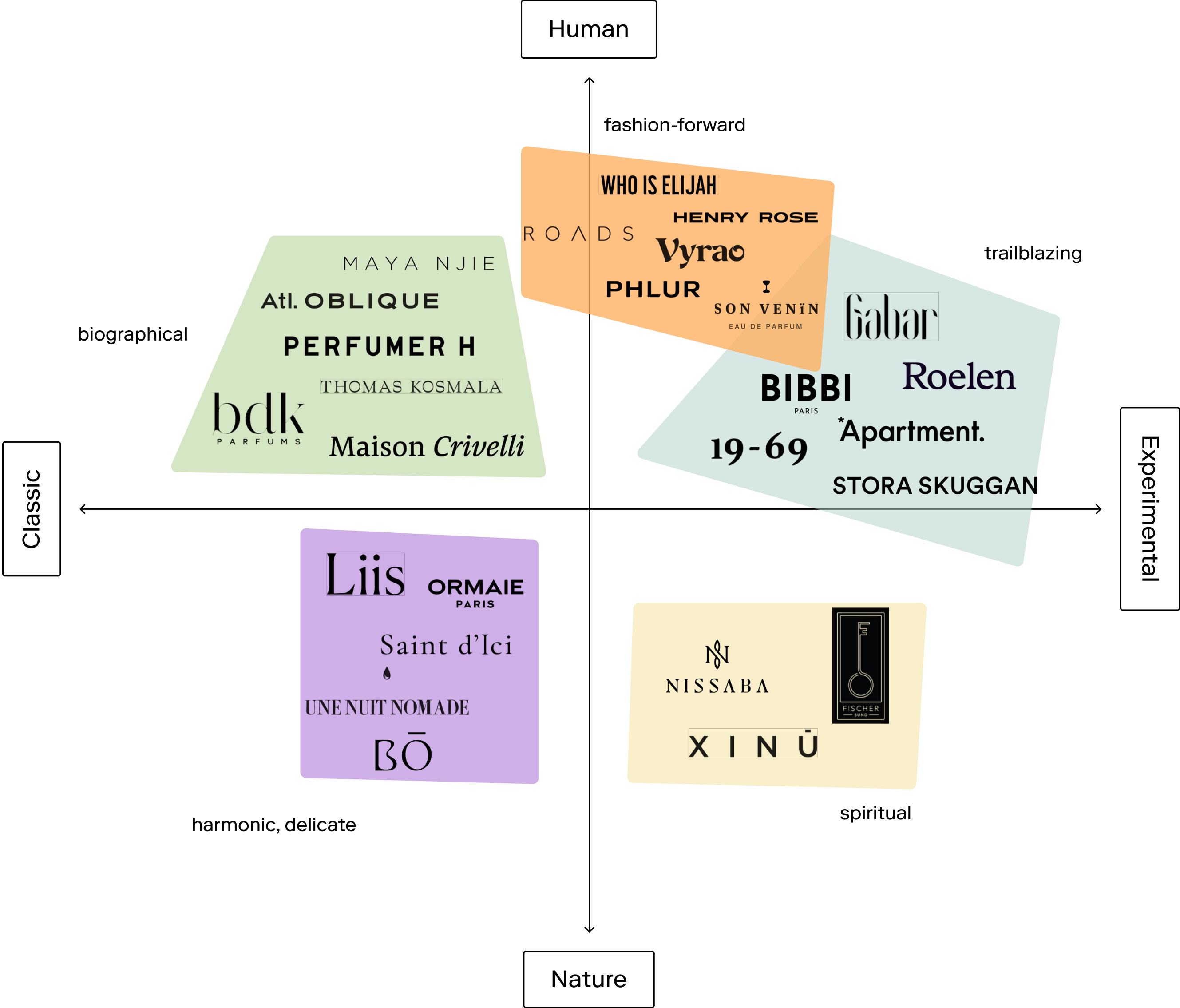
The Memoirists enjoy the classic and elegant presentation of fragrances while feeling connected to the perfumer or designer through the values they stand for. They seek authenticity, a personal story and connection behind the product they purchase.
- ### Main Character

It's giving main-character energy. They are the bold trendsetters, always ahead of the curve and unapologetically themselves. For them, life is an adventure, and they are the fearless protagonists, ready to conquer whatever challenges come their way.
- ### Brutalists

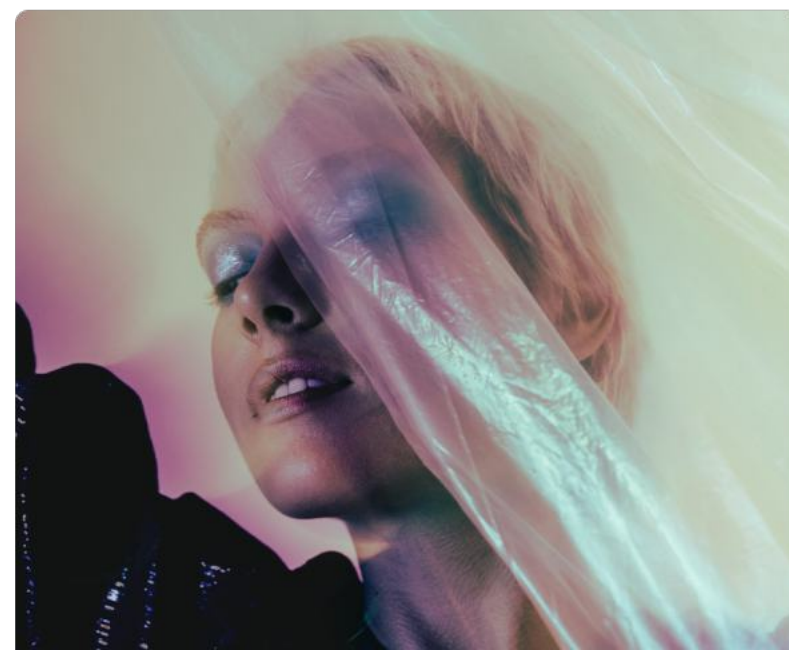
The Brutalists are attracted to brands that feel unique and try something different. They break with traditional interpretations, both within the product and in its presentation.
- ### Naturalists

For Naturalists, a connection to nature and its beauty is essential. They demand a commitment to honor the earth and its resources on both a spiritual and material level.
- ### Romantics

A romantic aesthetic and soft visuals that tickle the sensory part of the brain; the Romantic craves carefully curated and elegant experiences that transport the essence of fragrance through their screen.



1— Memoirists



Colors

The Memoirists favor muted and minimalistic color palettes, often utilizing neutral tones that convey sophistication and reliability. These subdued colors enhance the genuine and personal feel of the brand, allowing the products to stand out without overwhelming the viewer.

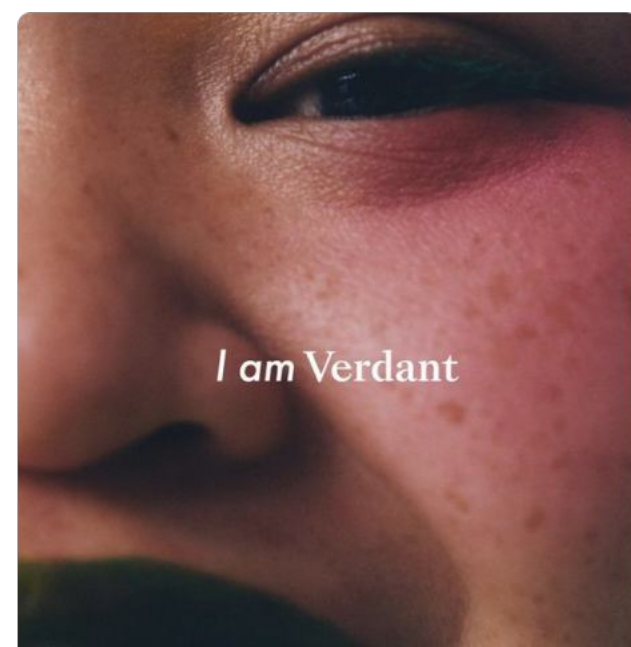
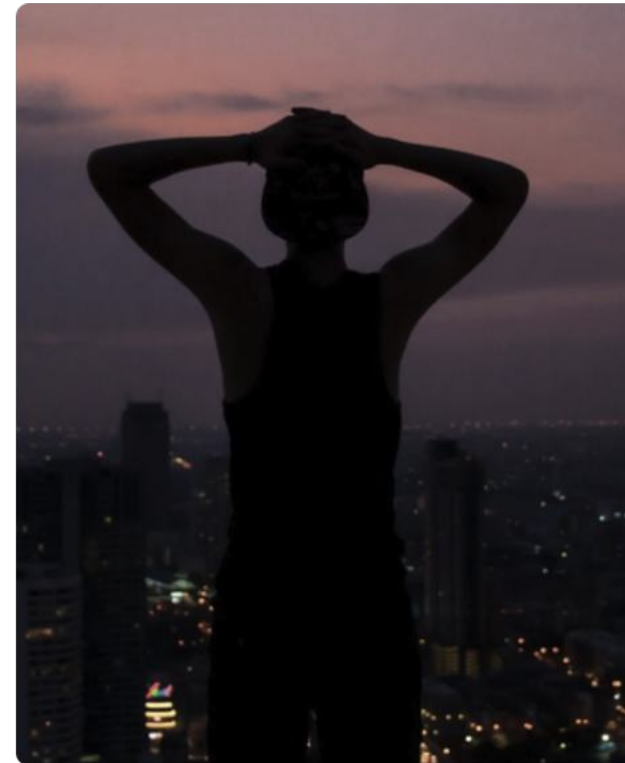
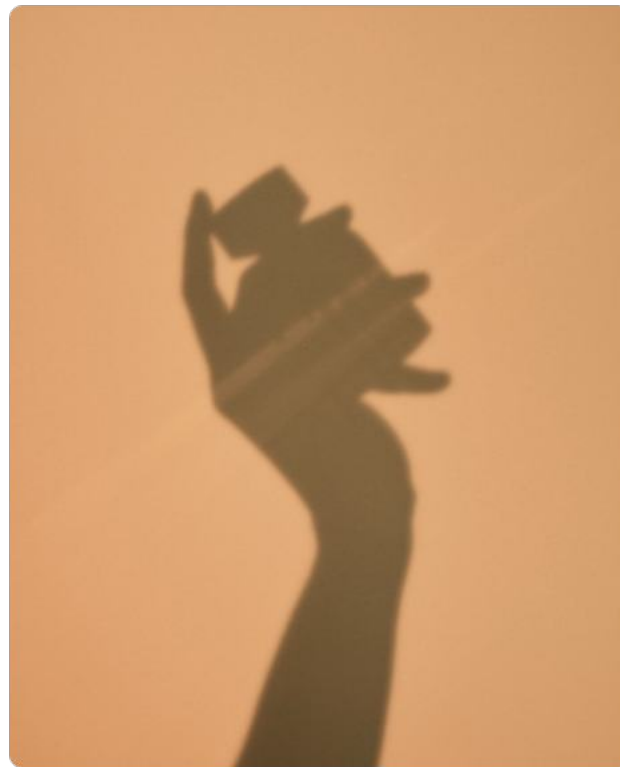
Photography

Photography is stylized and experimental yet remains approachable. Creative visual effects are achieved mostly in-camera rather than digitally, with a strong emphasis on natural light, even in studio settings. This approach results in atmospheric images that highlight the product's individuality and creativity without excessive decoration.

Product

Memoirists' products are presented with minimal adornment, letting the items speak for themselves. Packaging is classic and reliable with sophisticated and timeless design choices. This understated elegance aligns with the "elder sister" vibe, combining a sense of creativity with a mature, refined aesthetic.

2— Main Character



Colors

The Main Character embraces bold and vibrant colors, particularly in the warmer spectrum. These lively hues create a feel-good vibe and instantly draw attention, reflecting the playful and dynamic nature of each brand.

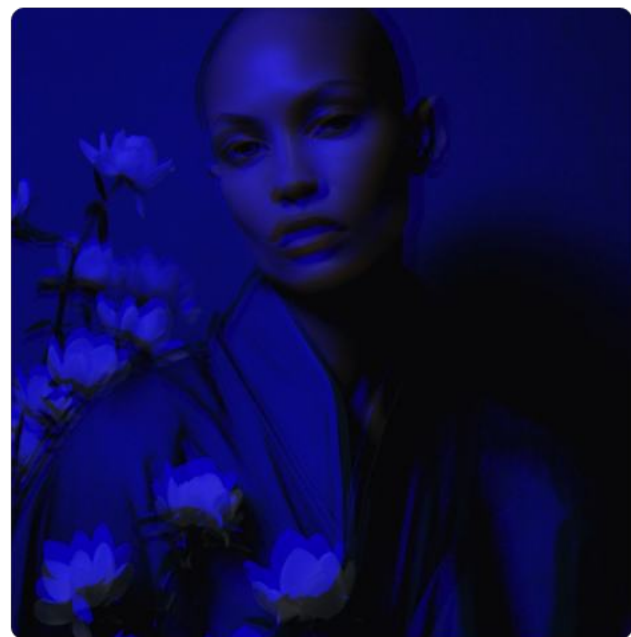
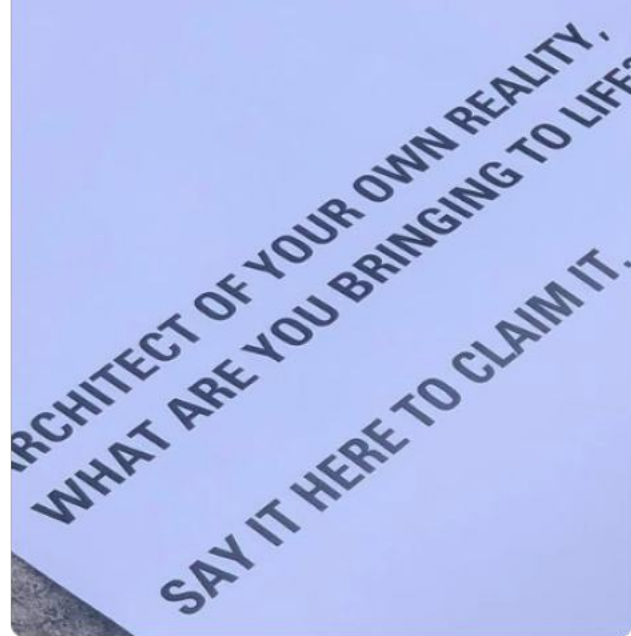
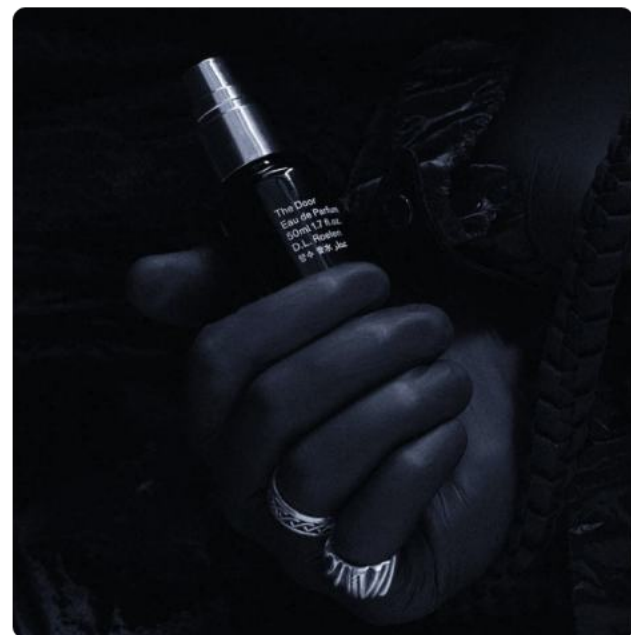
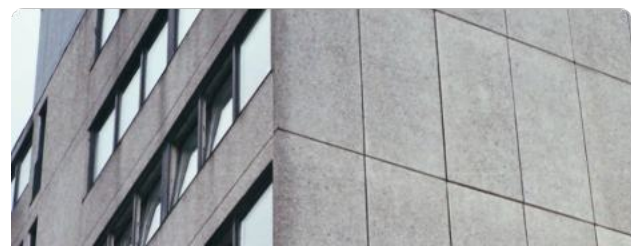
Photography

Photography captures playful features and candid snapshot moments. Artificial light sources and flash lighting are often used to enhance this vibrant, contemporary style. Products are displayed in decorated environments that evoke a particular lifestyle or feeling, adding to the playful and engaging narrative.

Product

Main Character products feature minimalistic type treatments, allowing the flacons to remain the focal point. Packaging employs bolder, more contemporary type choices, often using grotesque typefaces that steer the design towards a modern, commercial aesthetic. This approach underscores the brand's youthful and feel-good essence while maintaining a strong visual impact.

3— Brutalists



Colors

The Brutalists feature a minimal, technical color palette that leans towards cooler tones. This often results in a monochromatic or duotone look, emphasizing a sense of coolness and distant elegance rather than personal warmth.

Photography

Brutalist brands use obvious studio settings with artificial lighting to create a highly controlled environment. Products are displayed in contexts that highlight industrial elements, such as chrome, steel, and transparent plastic. Photography often includes futuristic and geometric compositions, with people portrayed in fashion editorial styles using experimental clothing, poses, and props.

Product

Brutalist products are characterized by minimal and straightforward type treatments, primarily using black and white labels. Packaging allows room for experimental elements, such as unique media, style filters, and illustrations, while maintaining a clean and geometric aesthetic that aligns with the brand's industrial and futuristic theme.

4— Naturalists



Uniqueness in abundance of greenery.



Colors

The Naturalists use muted, warm, and nature-based colors that create a soft and approachable aesthetic. These tones evoke a sense of calm and connection to the natural world.

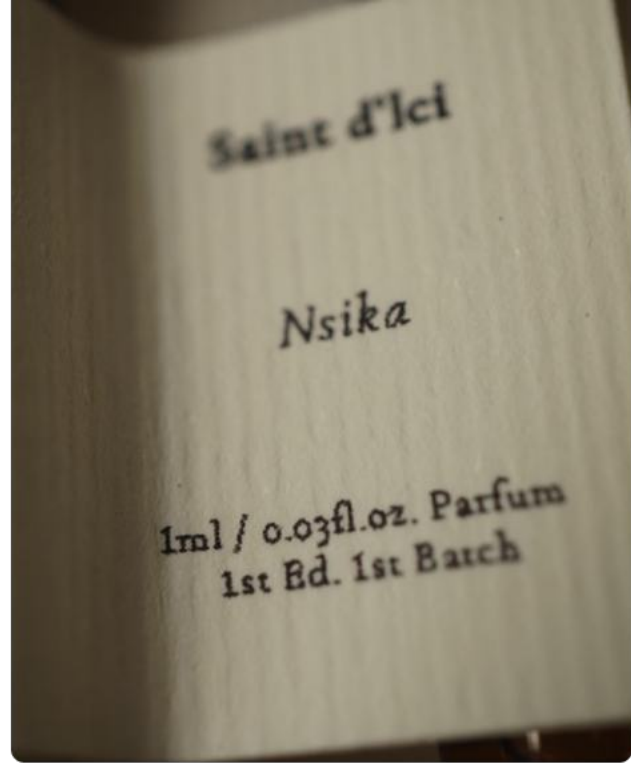
Photography

Naturalist brands focus on environmental and nature inspired still lifes. Photography features natural light and shadows, often in dimmed studio settings to create an organic, collage-like feel. Props include plants and earthy materials, integrating the product seamlessly into the natural environment. The imagery emphasizes the handmade and authentic aspects of the brand, often avoiding portraits of people to maintain an untouched, natural scene.

Product

Naturalist products use natural and bio-based packaging materials such as wood, cardboard, and textiles. The design includes a subdued type setting with humanistic typefaces, enhancing the approachable and softer feel. This organic visual language, characterized by floating forms and carefully staged compositions, underlines the brand's commitment to nature and craftsmanship.

5— Romantics



Colors

The Romantics utilize a muted, natural color palette that evokes a sense of calm and elegance. These colors highlight the brand's focus on sensitivity and organic beauty.

Photography

Photography for Romantics brands emphasizes sensory experiences through genuine portraits of people and products in natural light and environments. The use of mixed media, such as collages and illustrations, alongside organic shapes, creates a visually rich and emotionally engaging narrative. Luxury elements like gold or marble are subtly incorporated to maintain a premium feel.

Product

Romantics products feature a mix of materials, enhancing the sensory appeal. Packaging often includes serif typefaces that convey a premium yet sensitive aesthetic. This approach, combined with organic visual language and mixed media elements, establishes a refined and heartfelt brand identity.

Stuff that we expect to see more of in the next years

#PerfumeTok is the place to be

With trending terms like “hot girl”, “quiet luxury” or “holy grail”, perfume seamlessly integrates into the already popular TikTok rabbit holes.

Like any social media bubble, PerfumeTok isn’t immune to the pitfalls of overconsumption or the snobby misperception of being generic. When a fragrance once hailed as viral becomes excessively discussed in the online fragrance community, it can quickly become “overhyped” and put on a shelf ready to collect dust — a delicate balance that brands must learn to navigate.

Nevertheless, one thing remains certain: as long as TikTok is around, so will be PerfumeTok. The exposure that niche brands can garner from an audience that was once nearly unreachable is immense, and can take a brand from being known to a select few to boasting a list of 200,000 eager individuals awaiting the opportunity to purchase Phlur’s Missing Person.

Skincare – a new (and old) partner in crime

The correlation between perfume and skincare isn’t a recent revelation; scented body lotion’s have been around forever, it seems. However, the latest trend involves utilizing skincare to enhance fragrances and extend their longevity. The industry is cooking up products like perfume primers, solid perfume balms, hair mists, body sprays and many more. What’s particularly noteworthy is that these products are seldom used in isolation, but often in combination with fragrances.

By layering these products, customers are able to create an even more personalized scent profile, allowing them to express their individuality while at the same time extending the wear of the fragrance itself. Skincare isn’t competing, it’s reclaiming its place as perfume’s rightful sidekick.



Stuff that we expect to see more of in the next years

No more genderizing

The idea of associating scents with a specific gender is becoming outdated. Scent preferences are personal and not tied to biological sex. While brands may target particular audiences, imposing gender labels where unnecessary is losing relevance.

Many niche brands have already embraced this idea, integrating it into their products and visual identity. This trend towards inclusivity and gender neutrality isn't fleeting; it's gaining traction and reshaping the industry.

Looking ahead, we anticipate — and strongly advocate for — this approach to continue and extend into mainstream brands. Picture a future where fragrance is celebrated for its universality, where people can explore scents without being confined by societal norms. It's a future we eagerly await, where diversity and inclusivity prevail in the world of scent.

Lower the barrier

What sets Extrait de Parfum apart from Eau de Parfum? Why do perfumers incorporate synthetics? And what exactly goes into crafting a perfume?

While these questions might seem like niche industry details, a [fragrance trends report by Highsnobiety](#) indicates that consumers are actively seeking this level of transparency. We encourage brands to embrace the task of demystifying fragrance creation and making information more widely available. We believe these efforts will be met with appreciation and reward.

Discovery sets as a way in

There's a limit to what branding and marketing alone can achieve. When it comes to fragrances, customers ultimately want to experience it firsthand.

Enter: discovery sets.

What were once the cheap samples handed out in drugstores or fashion magazines have transformed into meticulously crafted boxes featuring an array of samples for consumers to explore.

It's not just an opportunity to test the fragrance, but also to connect with the brand itself.

Careful though, an overpriced, artfully designed box with high production costs could quickly turn into a dust collector, as few would be willing to shell out the equivalent of a full-size drugstore perfume bottle for just three 2ml samples.

After all, it's just a sample.



Feeling inspired?

Get in touch

We are thrilled to work with brands from small to large on branding, community building and digital products.