



Berner Fachhochschule
Haute école spécialisée bernoise
Bern University of Applied Sciences

Indie Perfume: Disruption and Dissent

Dr. Claus Noppeney

► Talk and discussion at Perfumer's Studio, Los Angeles, July 6, 2017

Goals for the session "Indie Perfume: Disruption and Dissent"

- Zooming in & zooming out the field of fragrance creation
- Stimulating reflection-in-action for artisan perfumers
- Crossing boundaries: research - practice
- Sharing insights & research results & experiences:
- Open exchange, dialogue & discussion
- Generating some qualitative data

Contents

- How do you see the field? And where are you?
- Do you believe there is a bubble in niche perfumery? In what way? Why? Why not?
- What do you like about creating scents? What is particularly rewarding to you?
- What is innovative about your scents? Where do you see your perfumes on an innovation scale? What is traditional? What is innovative about your creations? Experimental?
- How do you work with briefs? How do you collaborate across disciplinary boundaries?
- Where do you see your practice in the genealogy of scent? And why?
- How does this differ from how others see your practice? Customers, bloggers, reviewers?
- How do you relate to "craft", "artisan perfumery", "scent design", "art"? Which label is relevant to you? Why? How?

How do you see the field? And where are you?

Do you believe there is a bubble in niche perfumery? In what way? Why? Why not?

Facing a pluralization of niche perfumery: overall growth & fragmentation

- Fragrance sales dropped 6% in US in 2016 (Nielsen):
 - prestige sales rose slightly
 - while mass dropped significantly
- Launches in overall fragrance category decreased by 9% in US in 2016 (Nielsen)
- Niche perfumery segment added more than \$240 million to the fragrance market in US since 2014
- Fragmentation of the segment: growing niche or growing niches? Several niches!

Empirical focus on a trade fair devoted to artistic perfumery: Esxence in Milano

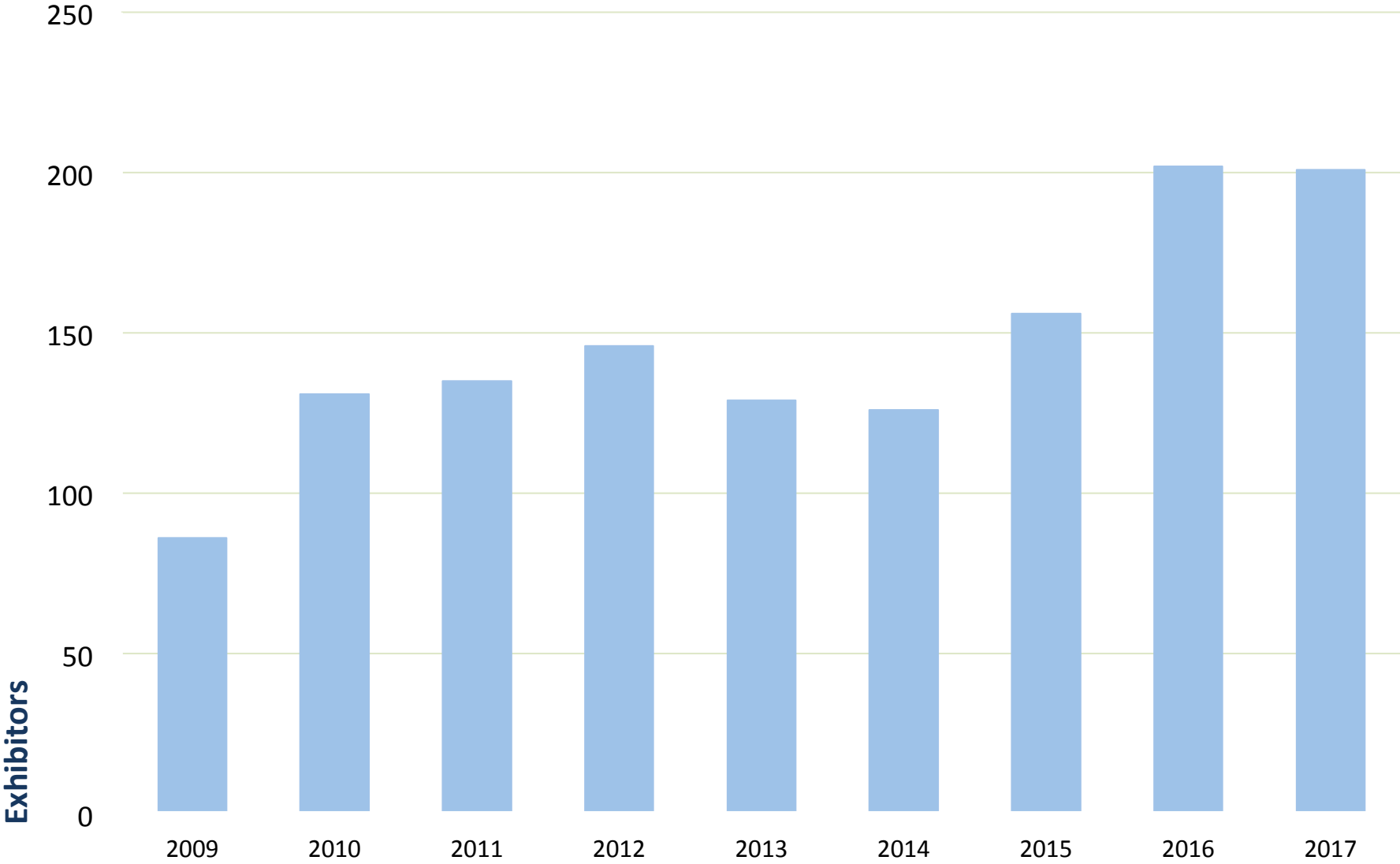


Esxence
THE SCENT OF EXCELLENCE



© Sarah Colton

Number of exhibitors at Esxence yearly 2009-2017



Esxence press releases 2009-2017.

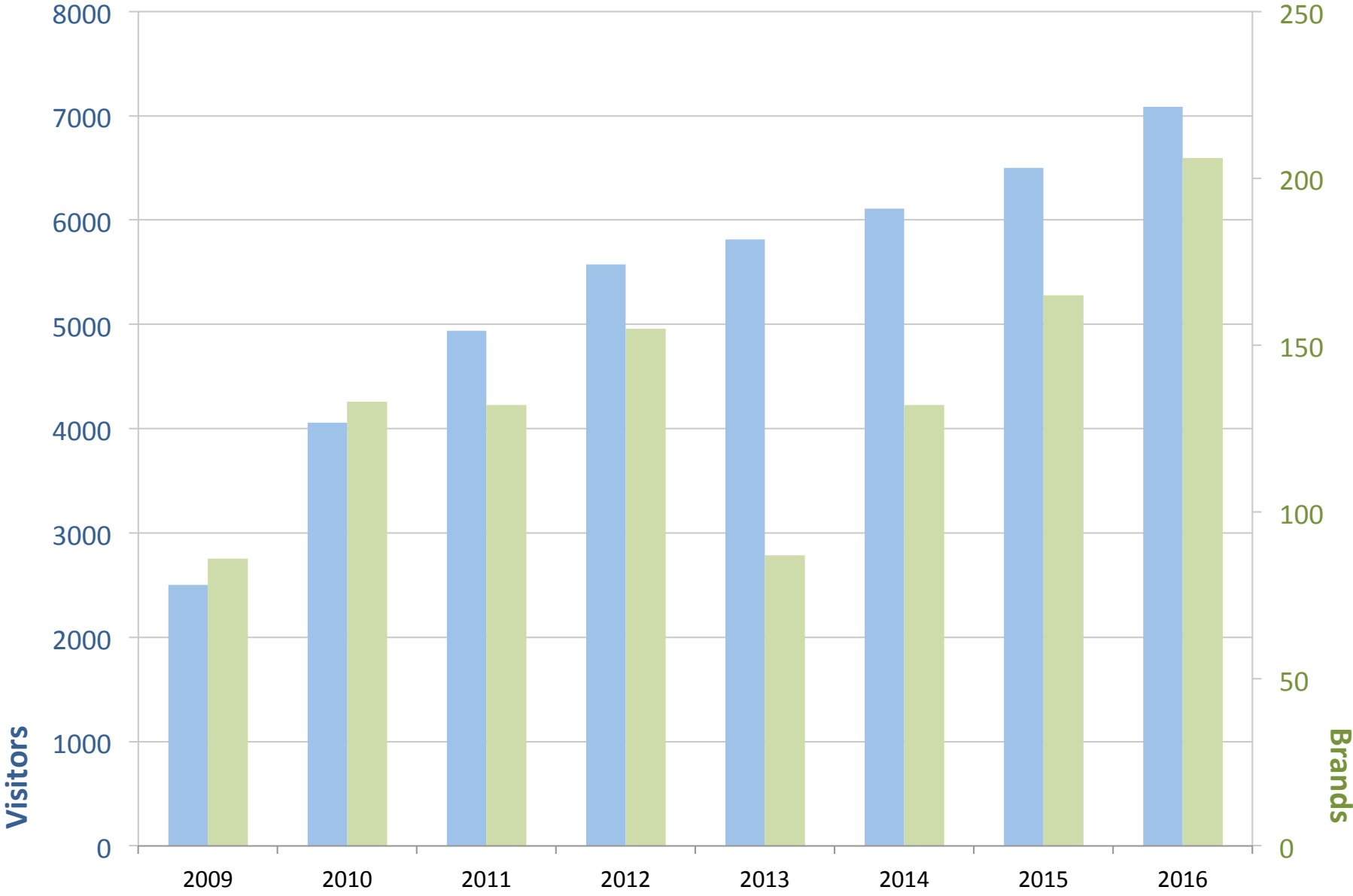
Three brands have continuously been present at Esxence 2009-2017

- Floris
- Linari
- Nobile 1942

29 Brands have been continuously present at Esxence 2013-2017

1. ABSOLUMENT ABSINTHE
2. AU PAYS DE LA FLEUR D'ORANGER
3. BOIS 1920
4. BRUNO ACAMPORA
5. CARNER BARCELONA
6. CASTLE FORBES
7. CHABAUD MAISON DE PARFUM
8. ETAT LIBRE D'ORANGE
9. FLORIS
10. HISTOIRES DE PARFUMS
11. HUGH PARSONS
12. JARDIN DE FRANCE
13. JOVOY PARFUMEUR PARISIEN
14. JUL ET MAD
15. LINARI
16. LM PARFUMS
17. MAJDA BEKKALI
18. MANCERA PARIS
19. MENDITTOROSA ODORI D'ANIMA
20. MONTALE
21. NOBILE 1942
22. OLIVIER DURBANO
23. PANAMA 1924
24. PARFUMS M. MICALLEF
25. PRUDENCE - PARIS
26. RANCÉ 1795
27. RANIA J
28. ROBERT PIGUET
29. ROSE & CO. MANCHESTER

Esxence 2009-2016: growing number of visitors and growing number of exhibiting brands



Exhibitors 2017

- 201 total exhibitors
- 129 returning exhibitors from the previous year
- 52 Newcomers to Esxcence
- 20 exhibitors returning from other years

Observations

- We see a substantial moving in and moving out of brands as well as exhibitors into the market.
- On the one hand, brands and exhibitors disappear, the market seems to be saturated.
- On the other hand, around 50% of exhibitors at the Esxcence fair are still newcomers each and every year
- There seem to be low entry barriers for the market, as well as *low survival rates*.
- Is this sustainable? Is there a bubble of niche perfumery?

What do you like about creating scents?
What is particularly rewarding to you?

What is innovative about your scents?
Where do you see your perfumes on an
innovation scale? What is traditional?
What is innovative about your creations?
Experimental?

Innovation in perfumery can occur along different dimensions

- Totally new ingredients or previously unknown smells in perfume
- A unique production process
- New combinations
- Olfactory form
- Concepts
- Packaging design (limited edition)
- Packaging size

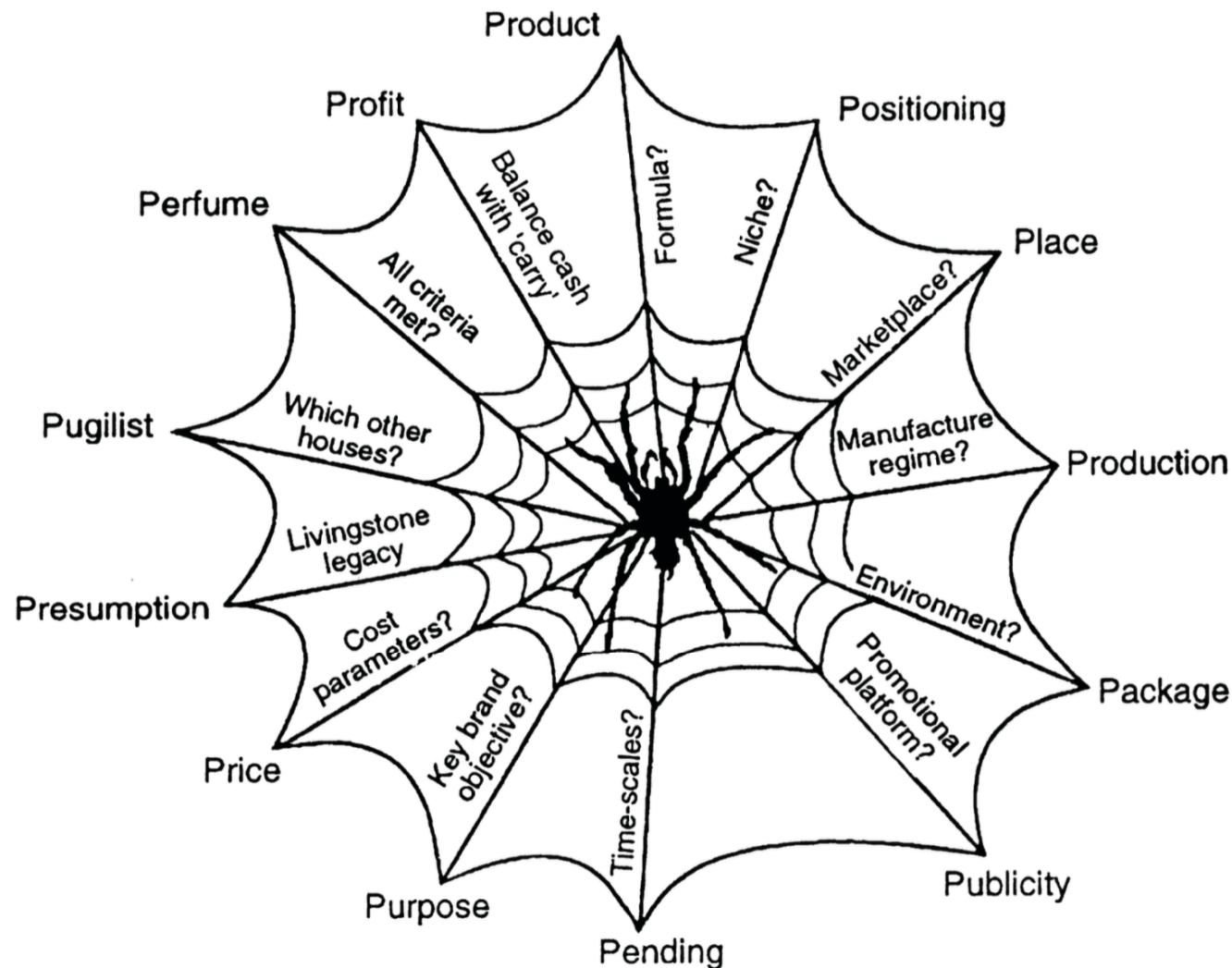
We'll have to count on chemists to find new substances, if we are to make new and original notes. **Yes, the future of perfumery is in the hand of chemistry.**



Ernest Beaux in 1952 according to: Kraft, P., Bajgrowicz, J. A., Denis, C., & Fráter, G. (2000). Odds and Trends: Recent Developments in the Chemistry of Odorants. *Angewandte Chemie International Edition*, 39(17), 2980–3010, p. 2981; Sell, C. (2014). *Chemistry and the Sense of Smell*. Hoboken, N.J: Wiley.

How do you work with briefs? How you collaborate across disciplinary boundaries?

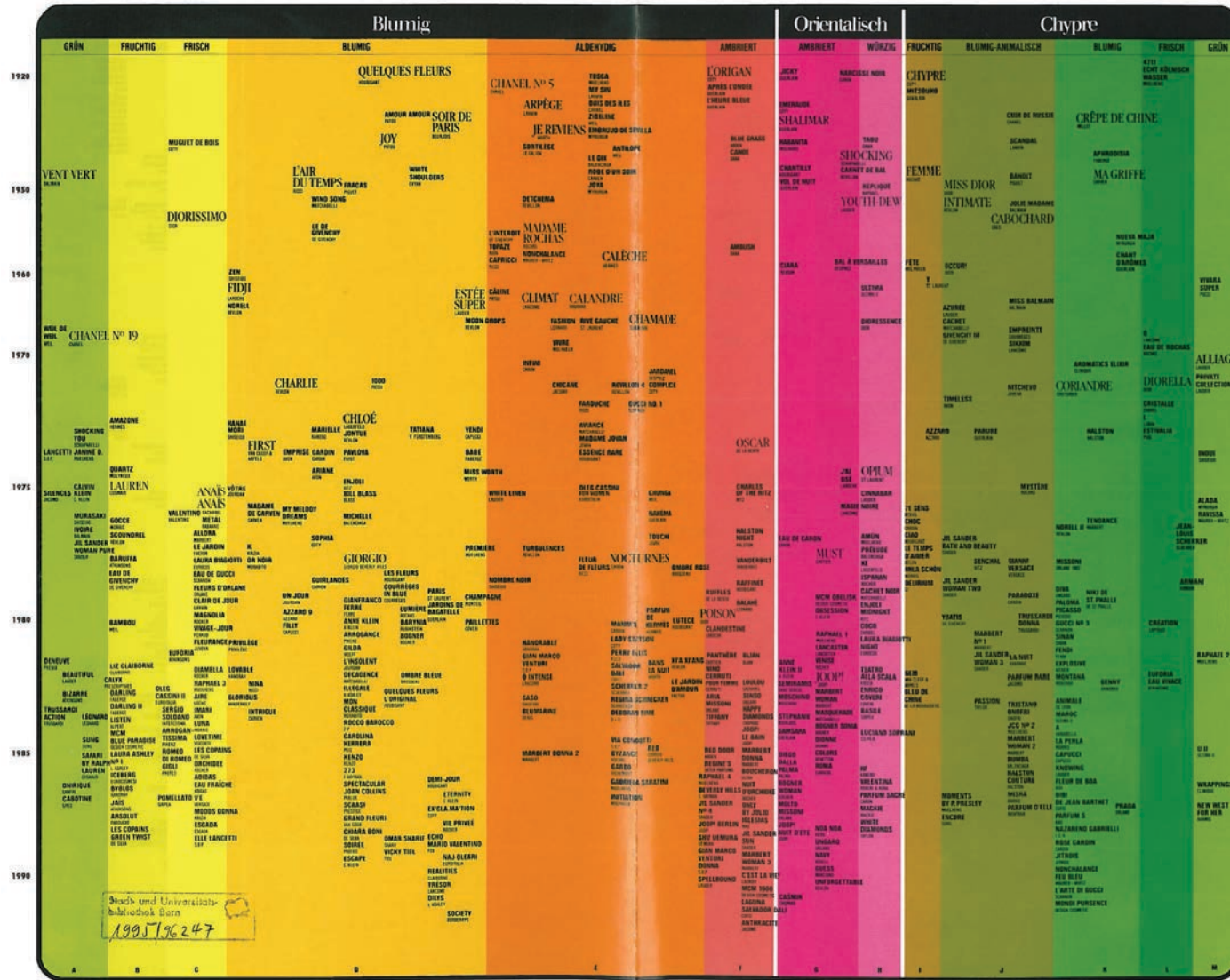
13 P's constitute the building bricks of a substantial fragrance brief, with a general outline of the key thoughts linked to them



Pybus, D. (2006). The Perfume Brief. In C. Sell (Ed.), *Chemistry of Fragrances: From Perfumer to Consumer* (Revised., pp. 138–142). Cambridge: RSC Publishing, p. 140.

Where do you see your practice in the genealogy of scent? And why?
How does this differ from how others see your practice? Customers, bloggers, reviewers?

Genealogy of perfumery for women

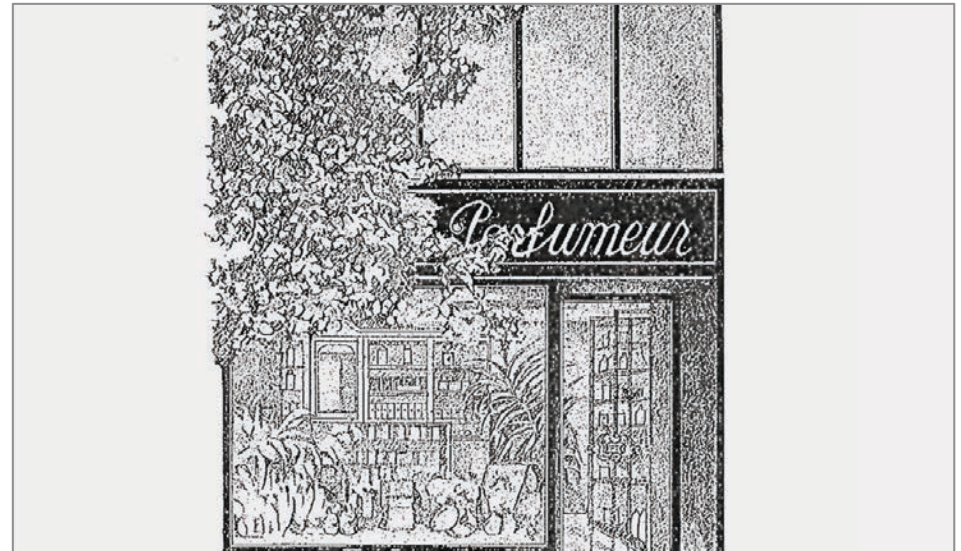


Haarmann & Reimer GmbH Holzminden (Hrsg.). (1974). Geruch und Geschmack. Holzminden.

Re-focusing on the juice & its creator in 1976



He experimented and created original scents with “natural essences”. With the success of his first line of fragrances, Jean Laporte was named L'Artisan Parfumeur – **the craftsman of fragrance** – by perfume enthusiasts.





Everyone is
niche.

We are not.

We are perfumers
who care.



LIBERTÉ, ÉGALITÉ, FRAGRANCITÉ

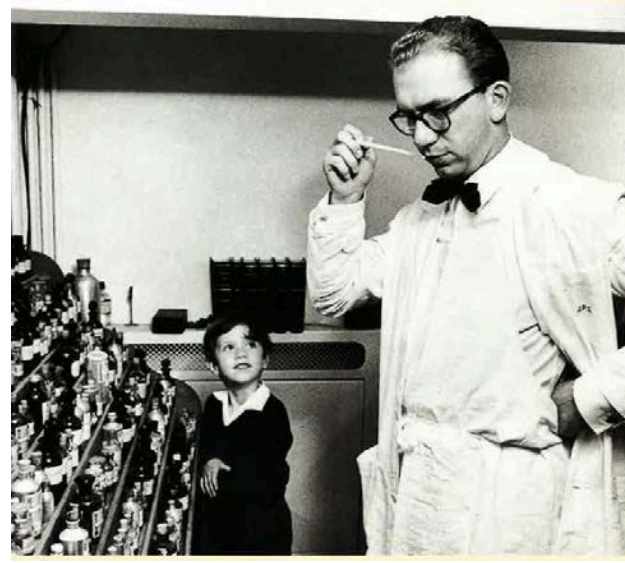
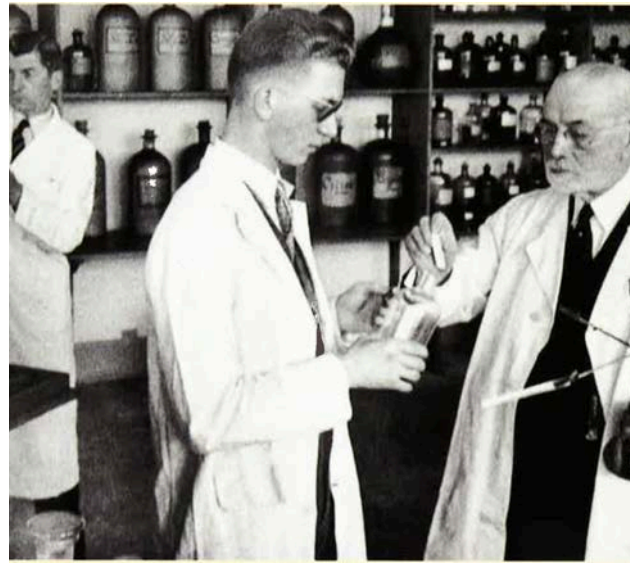
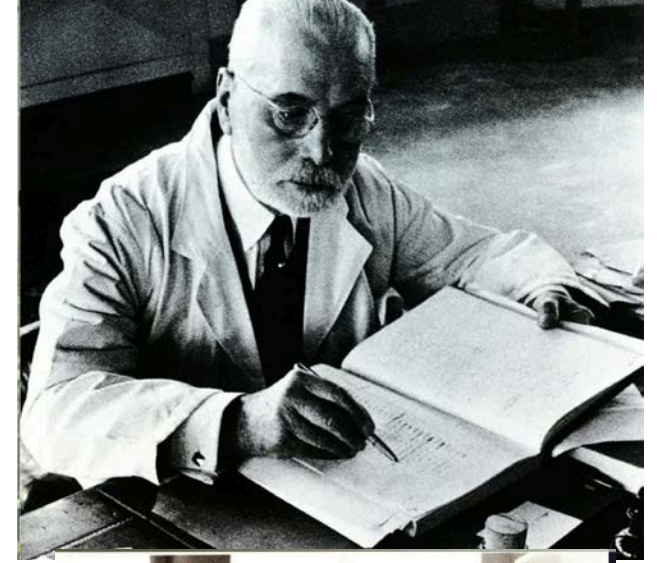
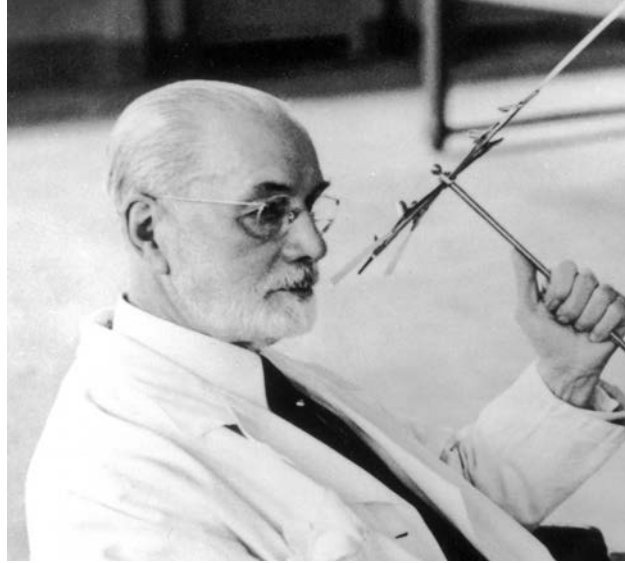
a fragrance manifesto

by master perfumer Christophe Laudamiel

Christoph Laudamiel: The naked truth – a fragrance manifesto 2017

<https://d3ciwvs59ifrt8.cloudfront.net/c7a003f5-73ff-416d-a535-1bc05c6fce5b/e966058c-a2fb-4435-8d93-836a32bfe094.pdf>

How do you relate to "craft", "artisan perfumery", "scent design", "art" ? Which label is relevant to you? Why? How?



Guerlain, J.-P. (2002). *Les routes de mes parfums*. Paris: Le cherche midi.

There are even more questions

- How did you get into your perfume practice? What has helped you the most in your development?
- How important is a knowledge of chemistry for your practice?
- How important is the business perspective for your perfume practice?
- How do you think does your work practice differ from the work in perfume industry?
- Perfumers often speak and think about perfumes as similar to works in other creative practices? A building? A symphony? A painting? Accordingly, molecules can "dance" or a perfume "sings". What analogies do you see?
- ...



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