

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 believer 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 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?

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

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# 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!

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





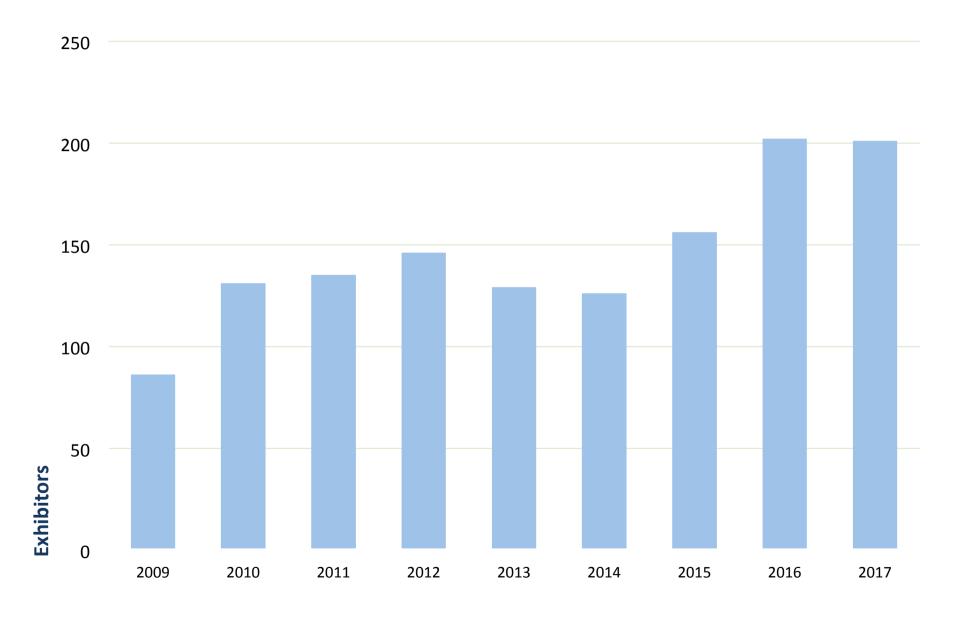








### **Number of exhibitors at Esxence yearly 2009-2017**



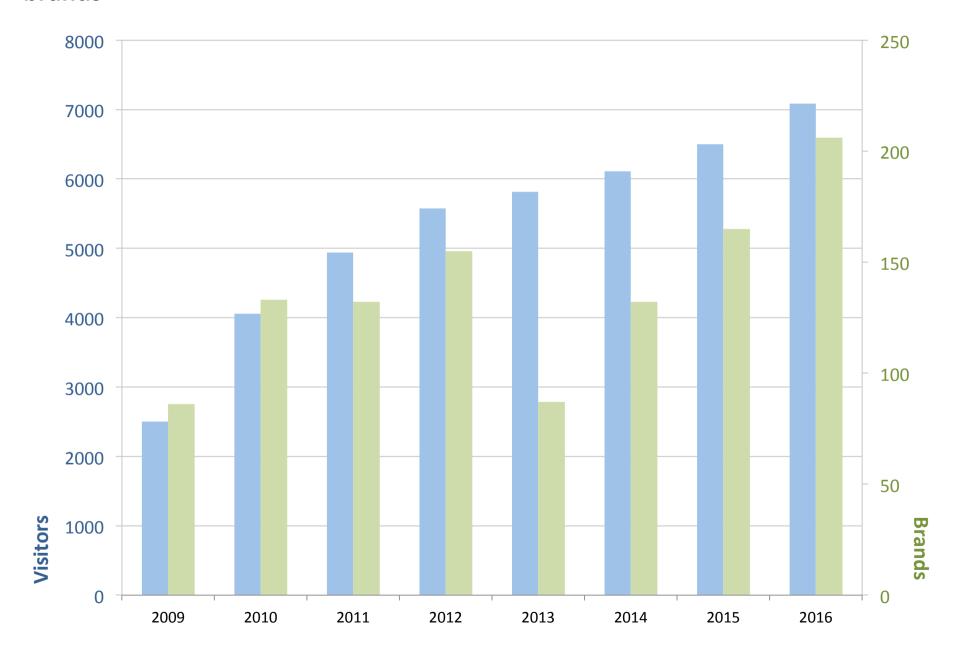
## Three brands have continuously been present at Esxence 2009-2017

- Floris
- Linari
- Nobile 1942

#### 29 Brands have been continuously present at Esxence 2013-2017

- 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?

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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.

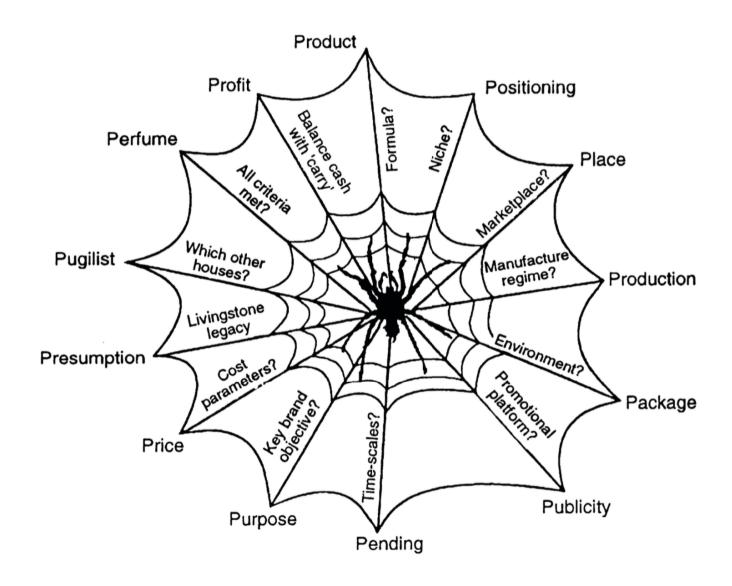


Ernest Beaux in 1952 according to: Kraft, P., Bajgrowicz, J. A., Denis, C., & Fráter, G. (2000). Odds and Trends: Recent Developments in the Chemistry of Odorants. *Angewandte Chemie International Edition*, 39(17), 2980–3010, p. 2981; Sell, C. (2014). *Chemistry and the Sense of Smell*. Hoboken, N.J: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

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

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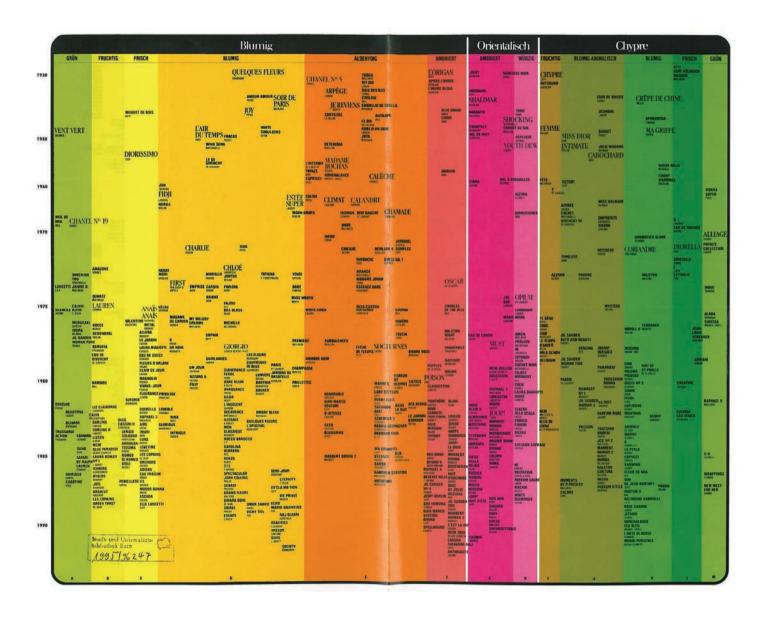
# 13 P's constitute the building bricks of a substantial fragrance brief, with a general outline of the key thoughts linked to them

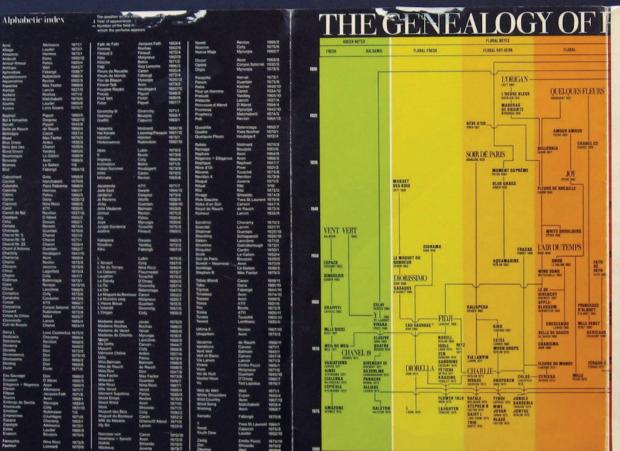


Pybus, D. (2006). The Perfume Brief. In C. Sell (Ed.), *Chemistry of Fragrances: From Perfumer to Consumer* (Revised., pp. 138–142). Cambridge: RSC Publishing, p. 140.

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 perfumey for women





Amongst the pure floral notes belong the oldest prestons. CUES\_CUES\_FLEXRS' Housings (1972) is one of the first floral phastapy notes, whose forestroners were the classical forel fragrances, such as nose, notel-crange bioscens, and jaamine. A very beautiful floral composition from the earlier years, that even today is still obtainable, is No. 22(Chanel (1928).

Whereas the lidder performed on a purely with the control of the c

The creations of the House of Patou, marriely JOY (1935), which consisted predominantly of a rise and assertine harmony, as well as the more recently introduced MILLE (1975), which is described as the present days most expensive perfurse, belong to the proved expensive perfurse, belong to the provide expensive perfurse, belong to the provide asserting planetary votes. The accord used in JOY's reappears in versional distinguish perfurses.

3. THE FAMILY OF ALDERYDIC NOTES. In the genealogical table, this family is distri-buted over two fields, namely, the aldehydic-floral perfumes with CHANEL No. 5 as starting point, and the heavier fragrances, under the heading aldehydic-floral-woody-powdery

Within these two groups are gathered a great in this make two groups are garantees a great many of the most popular phanishan notes, although in part these differ considerably from each other. As their principal common feature, they display the characteristic note; of other parts of the contribution in an expecial faction to the unfooting of these

Beside CHANEL No. 5 (1921), without doubt Beatis CHANES, No. 5 (1927), without doubt the most famous perfure enrongst the side-hyde notes, also of importance in the family are the following outstanding sathalis. ARIPGE Larry's (1927), in related to Chanel No. 5 but, however, which displays a fruiter found note in combination with fine evoids.

BOIS DES RESIChanel (1926) in which an exotic woody note dominates, surrounded by a radiant floweriness and perticularly tensor

MADAME BOCHAS/Borbas (1985) carried the

CALÉCHE/Hermes (1961) embodied a floral-aldehydic wood note, in which was incorpo-rated a fine income note, carrying over to a mossy, alightly chypre-like base.

CLIMATA\_ancome (1968) is a very locatious creation, that derives from MADAME ROCHAS, and in which a green rose complex leads to a wonderful overall impression.

4 THE FAMILY OF CHYPRE NOTES. The protetype of head-adistrytic messay performes a CHYPRE-COY (1977), that has so despit penetrated into the language of performer part has been considered as frequently used as a description of performe notes, and once may appeal of the Chypre-family in the generality, they occupy the language area.

Fresh-actelydic-mosey Shrully speaking, CHYPRE/Coty (1917) should be described as a foreunner of this group, because in it the adehydise do not appear, in this group, the following perfumes are of importance.

MITSOURD/Guertain (1919), a light fruity-scoentuated estination of the Chypne theme, characterized by an emphatic bengamen-agrumony heathness, confrested with a web-fixed motery base.

CREPE DE CHINE/Miller (1925) a again a variation on the basic Chypre theres, but the use of fathy admirydes and luciarious flowery argredients leads to a perfection that made this perfection to a rew term.

MA GREFE/Carven (1944). Through the use MA (prompt carried trade) involge the use of a deministring particular controller. The Chypre note was set on a new track. This been-green, individual accord that trakes MA GRIFFE unmistabable, is without double a result of perfurnishing during, that has been

di REVERS/Worth (1902) is an incomparabily Aldehydic-moosy enimalic: BANDIT/Piquet elegant, emashrigh harmonissus perfurne (1944) was devised considerably perfer than crisial entering the participation of the better Annual CAROCHARD/Gree (1958), but it adout they are county existed. From

claimed as a penuine novelty amongst the CABOCHARD derives a whole series of pertomes, every one of which has attained a high degree of popularity

MISS DIOR/Dior (1947) is likewise on eldebasic theme of ARPEGE further using more MSS DIGHTOR (THAT's ill immitted and sidely hydromously enternalize partners with an original green recently entered the most interesting entered in the most interesting entered in the group. Another important representative of this group is RTIMATE/Review (1985), a Systeal American performance whose securious Navelees called forth a series of similar notae.

of Mosay-fruity, Here, Invo transis must be mentioned (FMUT VERTIFictions) (1900); which is RAMADIFICATIVE (1904) (1900); which is RAMADIFICATIVE (1904) (1904) (1904) fruity-mosay manerous, and state FEMMID (FOUTH (1904)); which is perceived fruit mist in contributed with an arrapisor mosay beautiful and an arrapisor mosay beautiful (1904) (19

d) Green-balazamic. This group was maniformed earlier, in connection with the green outer, in chees, the dominised green note is contrasted with a mough-pleasamic base first powersors a Chypre character. The most bystal representatives of this group are "YPSE Lisacest (INSEL WARACTURE INSEL GOSTICCHY SIZE).

5. THE FAMILY OF ORIENTAL PERFLINES.

The indicative compositions in this family are SHALARAFOLIANT IN THE SHALARAFOLIANT IN THE SHALARAFOLIANT IN THE SHALARAFOLIANT IN A BASIS OF THE SHALARAFOLIANT IN THE SHALARAF

National Coast. National Coast

A - 7 THE LEATHER AND THE TOBACCO

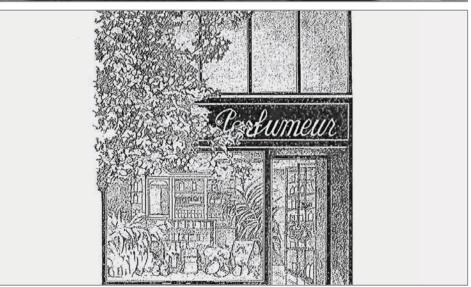
FAMILES
The headings, following and evolver, arthroping a performable terms very different, have been supported to one field because there are only a few sociation in which these marked and are an provinced that they can be arenated in this rank of principal other-bankman.

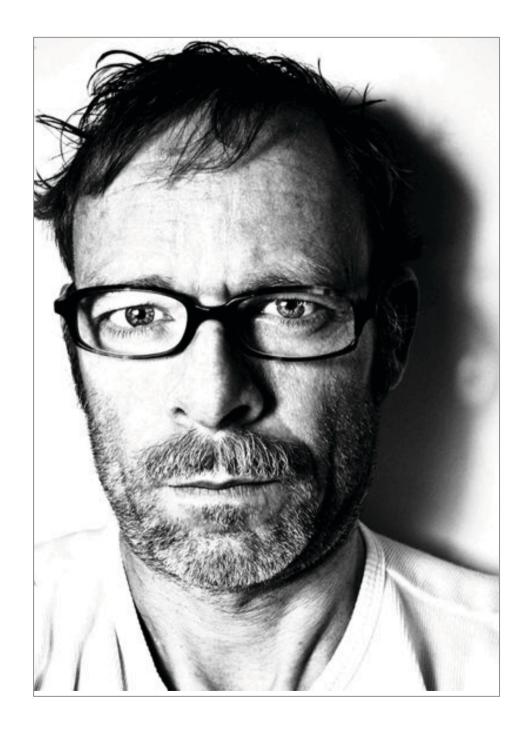
# Re-focusing on the juice & its creator in 1976





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

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

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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 perpective 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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