

# Out of Africa

Creating successful fragrances for consumer products in African markets is not only about embracing the latest trends, but also their performance in specific washing conditions and contrasting environments.

Rebecca Mulcahy and Richard Odafi, Seven Scent

Experiencing a fragrance in the environment in which it is actually used is essential for a perfumer's understanding of how to begin the creative process. For products aimed at African consumers, this means travelling to specific regions in each country and mapping the different odors in relevant locations. Observing a washing powder being used in Africa near an open sewer, next to a petrol electricity generator or beside a busy road, for example, tells the perfumer whether the fragrance lasts beyond the first hit of water and, crucially, which background odors are present and whether they need to be overcome. A recent trip by the authors to Lagos demonstrates the value of this approach.

## Smells of Lagos: a Study in Contrasts

Situated on the southwest coast of Nigeria, Lagos is one of the fastest growing cities in the world. Current estimates put its population anywhere between 20 million and 40 million, which equates to a population density of between 50,000 and 100,000 people per square mile. This metropolitan area is composed of a group of islands; 20% of the area comprises waterways such as creeks and lagoons. With average temperatures of 31.5°C and 90% humidity in the dry season, Lagos presents a challenging and complex backdrop for fragranced products.

Faced with such a diverse city in which consumer home and personal care products are used in highly diverse environments,

accurately mapping malodors in key locations is invaluable. Lagos offers an interesting case study for what can be learned from an on-the-ground visit, and how this information can be interpreted and translated by a perfumery team to create winning fragrances.

The first step is to identify typical locations where wash products are used or bought, and which are representative of different environments in the city. These include:



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- Toilet blocks—use of hand lotion, soap and sponge
- Canteen—use of dish wash, personal products
- Market—use of personal products, purchase of laundry products and soap bars
- City mall supermarket—purchase of laundry, bar soap products
- Marshland—use of laundry products

A list of potential malodors is then established based on these various locales, and the presence of each assessed in each location on a graded scale from “very slight” to “dominant.” Malodors include:

- Stagnant water
- Spices
- Tobacco
- Chemicals
- Garbage
- Plastic
- Feces
- Urine
- Vegetation
- Body odor
- Must

## Market Recap: Nigeria and the Broader Middle East and Africa Region

The fragrance market in Nigeria grew in value by 13% in 2012, according to analysis by Euromonitor ([www.euromonitor.com](http://www.euromonitor.com)), driven by expanding retail outlets and a growing middle class. In addition, the analysis shows bootleg/illegal products are being combatted by local authorities, further improving prospects.

“With rising disposable incomes, population growth, and increased westernization, growth would be faster than the average recorded over the review period,” the report concludes.

Meanwhile, a 2013 Euromonitor report notes, “The emerging markets of the world stand out as the most important growth regions for fragrances. Middle East and Africa leads the way in terms of forecast growth from 2010 to 2015, with a predicted CAGR [compound annual growth rate] of just over 5%.” A 2012 report from Euromonitor, meanwhile, notes, “[F]ragrance in the Middle East and Africa will enjoy the strongest growth globally with volume sales increasing 30% between 2011 and 2016, albeit from a lower base.”

Because the region’s consumers own few if any consumer appliances, hand dishwashing and hand wash detergent products are popular in home care, and are expected to reach 6,500 and 4,900 tonnes, respectively, by 2016, Euromonitor notes. Fresh scents are popular due to environmental factors listed in the main section of this article. Floral scents are preferred in hand wash detergents, though oriental scents such as oud and sandalwood have proven to be popular in the region.

- Damp
- Soil
- Burning
- Cooking

This list and ranking enables a framework of influential factors to be established and recorded in each location, together with additional relevant observations. At an outdoor market in the Oshodi-Isolo area, for example, hot sunshine, high humidity, and pungent smells of raw meat and fish combine with stagnant water to create overwhelming sensory cues. Not surprisingly, the personal care and laundry products on sale here cannot be smelled at all in this heady environment. This contrasts with an indoor shopping mall in the suburb of Ikeja, which features low humidity, and where the dominant cooking smells from food stalls are minimal. Here, the purchase of laundry and bar soap products can be made in generally malodor-free surroundings.

Interestingly, laundry products are found in several contrasting locations across the city, and fragrances are expected to perform equally well in each. Clothes are generally washed in buckets and left out to dry. In the marshland, traffic odors carried from a nearby highway are considered slight in this relatively fresh location. This is also the case for laundry drying on lines in the backyards in Surulere area, where the odors of garbage, cooking and vegetation were effectively balanced by the pleasant smell of a fresh and fruity laundry powder. In contrast, laundry drying next to a canal in Surulere was subjected to the dominant odors of stagnant water, rotting rubbish and damp soil.

Overall, laundry products used in Lagos must compete with a number of malodors; traffic smells of petrol, diesel and rubber are common, as are dry or sandy soil aromas, and wet sewage. The strength and direct heat of the sun intensifies the sensory impact of the entire environment, particularly garbage odors and stagnating water. With 80% of the population shopping at outdoor markets, the fact that stalls selling fresh green oranges introduce a zesty burst of fragrance that effectively cuts through the background malodors is an important observation for the perfumery team.



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## Translating Trends

The results of this odor mapping exercise, together with on-the-ground understanding of product usage, forms the basis of fragrance creation tailored for the needs of African consumers. This is why it is important to repeat the assessment in the wet season to ensure new fragrances perform consistently well in all weather conditions.

The overall challenge is to create a fragrance with the finesse and complexity demanded by consumers, but which also delivers the required high performance in use. In the case of laundry soaps, for example, the fact that tallow is the common base in Africa presents immediate challenges, as it already has its own distinct fragrance. As a result, certain perfume notes, including delicate florals, cannot be replicated in this format.

This on-the-ground approach to product development has led to the development of a fragrance for a popular brand of scouring detergent powder for kitchen, bathroom and other household cleaning areas. The fresh, clean blend of green rose notes and ozonic characteristics has established a strong following among African consumers and demonstrates the positive results of research. The brand's enduring popularity can be largely attributed to the fact that its fragrance is very much tailored for the conditions and preferences of the region, and is not found in any other market.

## Research: Beyond Trend Forecasting

While reports of the growing trend for traditional oriental scents in the Middle East and African fragrance market (see Sidebar) provide useful consumer insights, this is only part of the picture for fragrance creation. Equally important is recreating the actual conditions in which the products are used, information that can only be gained through on-the-ground experience. Testing with expert panels is naturally a key step in the process, but it must be approached on two levels—likeability and real-world performance of the fragrance as it will be used by the consumer.



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Failure to achieve success in both areas will severely restrict consumer loyalty to the final product.

Africa is a diverse continent with exciting opportunities for fragranced products in laundry, household and personal care products categories—including colognes—but all need to work in diverse environments. First-hand experience is fundamental to successfully overcoming the complexities of this challenging and dynamic market.

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Address correspondence to Rebecca Mulcahy, Seven Scent, Lamplight Way Agecroft Commerce Park Manchester, M27 8UJ United Kingdom.

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