

# 2014 World Perfumery Congress Addresses Rapid Changes Impacting Global Industry



Focused on regulations, innovation, sustainability and new markets, the *WPC* provided inspiration for the industry's creative minds.

Victoria Frolova, Bois de Jasmin; special to *P&F*

*Produced by Perfumer & Flavorist and presented by the American Society of Perfumers, the 2014 World Perfumery Congress, held June 10–12 in Deauville, France, expanded on the 2012 U.S.-based edition, hosting 1,100 participants, 80-plus exhibitors and sponsors, and industry-leading speakers and presenters.*

*The largest numbers of attendees hailed from Western Europe, Asia-Pacific and North America, with strong and growing contingents from South America, the Middle East, Eastern Europe and Africa.*

*In addition to numerous WPC networking events and private celebrations hosted by leading fragrance companies, the event included a historic meeting among global perfumer societies (see **Page 56**), ensuring the conference was a truly global event focused on the enhancement and recognition of perfumery.*

*Meanwhile, the organizers have announced that the next WPC will take place June 13–15, 2016, at the Fontainebleau Resort in Miami Beach, Florida. Visit [wpc.perfumerflavorist.com](http://wpc.perfumerflavorist.com) for details and to sign up for updates.*



*The 2014 WPC, held in sunny Deauville, France, hosted 1,100 attendees from about 50 countries.*

—Editor in Chief

“The goal of an artist and perfumer is the same—to touch people’s emotions,” said photographer and artist Fabian Oefner in his keynote speech opening the *World Perfumery Congress (WPC)* in Deauville, France, on June 10, 2014. What is the role of perfume if not to add a touch of beauty and pleasure to the most ordinary day?

The main themes of the *WPC*—regulations, innovation, sustainability and new markets—addressed the goal of capturing consumers’ imagination, but also focused on inspiring the creators themselves in all spheres of the perfume industry.

There is no denying that perfumery is undergoing rapid changes, with the pace of regulation gaining momentum and the issues of transparency and renewability becoming more

critical. Equally dramatic has been the transformation of the role of the perfumers, from solitary figures behind the scenes to multitasking actors speaking for their creations. New challenges were the leitmotif of the *WPC*, but so were new opportunities and inspirations.

## Performance Innovations for the Consumer

According to Mintel, 23% of American women and 18% of American men are confused by the enormous range of fragrance product offerings. As Ruth Sutcliffe, senior marketing director and designer at Coty, said during the session on growth opportunities and innovation, “The industry is not responding to what the consumers want.”

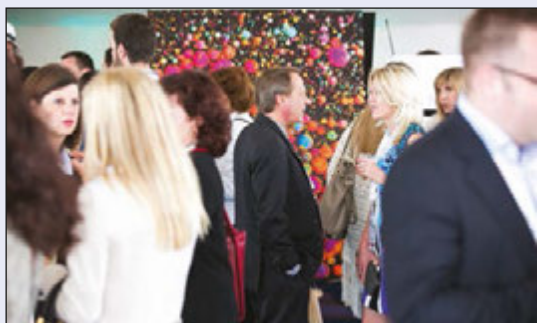
## More Photos Online

For more 2014 *WPC* images, visit [www.facebook.com/perfumerflavorist/photos](http://www.facebook.com/perfumerflavorist/photos) (no login required).

*(Continued on Page 42)*

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## Opening Cocktail Reception, June 9



The WPC began with an opening cocktail reception, featuring art by keynote speaker and photographer Fabien Oefner.



From left: Marguerite Gilkes, Lucy Henry (Pyrazine Specialties) and Emma Marchant (Stort Chemicals).



From left: Michael Lankin and Kaori Matsumura (both Takasago).



From left: Prabhukiran Nagaraj Vemulkar (Padmini Aromatics Pvt.Ltd.), Robby Gunawan (Pt Indesso Aroma) and Lokesh Nagaraj Vemulkar (Padmini Aromatics Pvt.Ltd.).



From left: Jei Mckinney and Irene Phillippe (both Encapsys), and Paige Crist (Perfumer & Flavorist).



From left: Haiqiang Wang (Xiamen Doingcom Chemical Co., Ltd.), Herve Fretay (Givaudan) and Patrice Blaizot (Parfum Cosmetic World).



From left: Erol Meshulam, Misel Gülçiçek and Beril Mesulam (all MG Gülçiçek International Fragrances Co.), and Gladys Gabriel (IFF).



A view of the cocktail reception; at center: Kent Lombard (Takasago).



▲ From left: Sandra Escobar (Fragransa), Marisol Cano (Mane Colombia) and Francisco Roldan (Fragransa).



Davasagar Shetty and Rasika Bhide (both SH Kelkar), and Stef Korver (PFW).

# Closing Gala, June 12

The 2014 WPC closed with an evening of dinner, cocktails, dancing, and catching up with new and old colleagues.



From left: Francisco Fernandez (Takasago), Mukesh Patel (Musks & Fragrance) and Gabriel De Gea Díaz (Takasago).



From left: Lee Beuk (A.C.S. International) and Takuya Midorikawa (Takasago).



From left: Conxa Ferrer, Nuria Bello, Jorge Miralles and Laura Morillo (all Indukern).



From left: Dian Anggraini Kusumaningrum and Della Mia Kalumata (both Pt Haldin).



From left: Toshihiko Ogasawara (T. Hasegawa Co., Ltd.), Takayuki Onuma (Morimura Bros., Inc.) and Hiroharu Kobayashi (T. Hasegawa Co., Ltd.).



From left: Karen Manheimer (Kerry) and Hussein Fakhry (A. Fakhry).



From left: Stéphane Bengana, Christian Provenzano and Dominique Preyssas (all CPL Aromas).



From left: Patrick Rogier and Pakker Dulkarny (both Robertet).



From left: Christian Eberhardt and Jean-Pierre De Mattos (both Mane).



From left: Michael O'Laughlin and Olivia O'Laughlin (both O'Laughlin Corp.).



From left: Sergi Sanchez, Myriam Zamora, Jorge Guerrero, Bettina Perisson, Olaf Larsen, Jayram Joshi and Alexandre Cevallos (all Eurofragrance).



From left: Michael Klamm, Christel Cuyvers, Marleen Frix, Alain Frix and Michael Jones (all Renessenz).

In this light, how does the industry capture the consumer's attention and how does it innovate in its different spheres?

Experts appear to agree that, on the consumer side, there is stronger demand in multifunctional beauty products. The traditional *eau de parfum*, *eau de toilette* and ancillary ranges may no longer be enough. Consumer research shows that many are confused by the concentrations and would rather have an interesting, distinctive product that will help them create a new scented ritual. Fragrance brands have responded by crossing over into skincare, with Chloe's *Crème de la Rose* skincare range and DKNY *Be Delicious Skin* being two recent examples.

Technical innovation for long-lasting fragrances is in high demand, with consumers all over the world wishing that their perfume lasted longer. For example, Mintel finds that 22% of American women want more lasting power out of their perfumes. For consumer needs in new markets, innovative solutions are required, such as the development of affordable aroma-materials, better malodor coverage and new delivery systems.

The discussion on innovation in perfumery touched upon the role of research and science. Since moods and emotions are linked with the sense of smell, knowing more about the way the brain and the olfactory receptors work may elucidate new avenues for technology. This is still a fairly unexplored frontier, and in the next 10 years, with further developments in synthetic biology and brain imagery, fragrance research and development will likewise evolve. Better understanding the functional aspects of fragrance materials and the way scents affect people's moods and well-being will shape new directions for innovation.

With regulations creating pressures in the industry, some producers are responding by offering new and modified products. For instance, Firmenich's Firascone<sup>a</sup> is a response to the restrictions in the damascone family. Firascone doesn't exhibit the skin-sensitizing properties of the damascone group, while its olfactory profile is close to  $\beta$ -damascone—fruity and rose-like, with an herbal, spicy nuance. In naturals, Biolandes has continued with its low-atranol moss essence. Producers realize that there may not be much compromise on the regulations, and they are adapting proactively.

"We need to focus on performance," noted Michael Popplewell, vice president of corporate R&D at International Flavors & Fragrances, "since the world is creating increasingly high demands on clients, customers, perfumers and researchers."

The ever-present question for the industry is into which area of innovation does a company invest? The answers range from investment into developing new ingredients to novel ways of using existing materials. As regulations limit the perfumer's palette, the focus on investing in new materials, especially high-performing molecules and ingredients that engage the senses, becomes stronger. Each company approaches this goal in different ways, and a walk through the WPC exhibit hall revealed varying examples, from Symrise's Vetival<sup>b</sup> to Firmenich's Clearwood<sup>c</sup>.

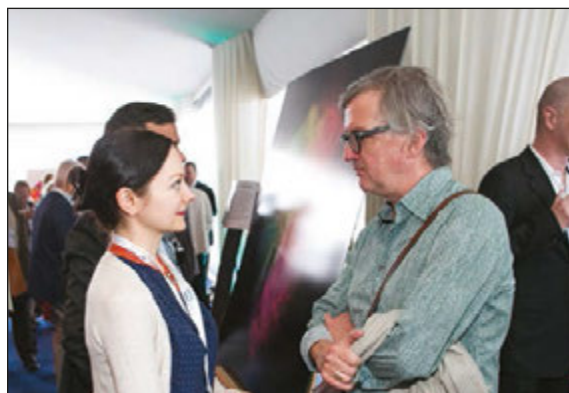
On the other hand, Claus Noppeney of Bern University cautioned that the current focus is overly research-heavy, and thus too narrow. Non-technical innovation, such as aesthetic



During the closing gala, from left: Daniela Knoop and Kai Kortekaas (both Symrise), Andrea Wiese (BASF), and Dirk Braun and Petra Shulz (both Symrise).



"The goal of an artist and perfumer is the same—to touch people's emotions," said photographer and artist Fabian Oefner in his keynote speech.



Author Victoria Frolova (*Bois de Jasmin*, special to P&F) and Ralf Schwieger (*Mane*).

innovation and design-driven innovation, and studies of the role and value of scent in society and organizations can open new avenues and complement the programs on ingredients and technical delivery.

Hand-in-hand with innovation comes education. In traditional media, perfume is often portrayed as an expendable luxury, and even a dangerous one. There is a consumer misconception that "chemicals are bad," and with the continuing discussion on allergens, there will be a need for de-demonizing synthetics, which will require a strong public education campaign.

<sup>a</sup>Firascone is a trade name of Firmenich

<sup>b</sup>Vetival is a trade name of Symrise

<sup>c</sup>Clearwood is a trade name of Firmenich



*"The industry is not responding to what the consumers want," said Ruth Sutcliffe, senior marketing director and designer at Coty (center); at left is moderator Jeb Gleason-Allured (P&F) and at right is Anne-Sophie Dussert, R&D head of development, Clarins.*



*According to Emmanuelle Moeglin (at right; Mintel), 23% of American women and 18% of American men are confused by the enormous range of product offerings; Moeglin was joined by experts, including Tanja Deurloo (at left; Independent Scent Expert and Founder, Annindriya).*



*"We need to focus on performance," noted Michael Popplewell (IFF-LMR), at right, "since the world is creating increasingly high demands on clients, customers, perfumers and researchers." His comments came during a panel featuring Thierry Audibert (Givaudan), at left, and moderator Miguel Alemañy (P&G).*



*From left: Perfumers Emilie Coppermann (Symrise AG) and Anne Flipo (IFF-LMR) discussed creativity.*



*Some of the most vibrant markets for fragrance are the Middle East and Latin America, while in Japan there has been a growing interest in sophisticated scents for functional products. Discussing the markets of Asia were, from left: Jeff Falk (in profile; GCI Magazine), Kenji Maruyama ( akasago), Shigeru Sawamura (Kao Corp.) and Kedar Vaze (Kelkar Group).*



*Claus Noppeney (Bern University), at left, cautioned that the current fragrance focus is overly research-heavy, and thus too narrow; Noppeney spoke during a session that also featured (at right) Christophe Laudamiel (DreamAir Studio) and Jenny Tillotson (Central Saint Martins/Sensory Design & Technology Ltd.).*



From left: Felix Mayr-Harting (Givaudan), Paige Crist (P&F) and Gilles Andrier (Givaudan).



Ahmet Baydar (IFF).



Discussing the role of packaging design in the sensory experience of brands were (from left) Anne Abriat (Coty), Francois Duquesne (Fragrance Republic LLC) and Sandy Gregory (MWV).



"When consumers know about risks, when they can access relevant information, they can judge for themselves how to manage risks, but today when it comes to perfume, they don't have the relevant data," said Julie Girling, MEP for the South West, United Kingdom, European Parliament.

As Sutcliffe observed, "We are used to development involving just three players—R&D, marketing and perfumers. We need to add the fourth one, the customer."

These customers need authentic and engaging information on the fragrances they wear.

### Navigating New Markets

To attract new markets, the perfume industry needs ways to capture consumers' imaginations and reach fragrance counters in different countries. Some of the most vibrant markets for fragrance are the Middle East and Latin America, while in Japan there has been a growing interest in sophisticated scents for functional products. But entering these markets is accompanied by varying challenges that reflect the local economic, political and social frameworks.

The Middle East—in which Saudi Arabia and United Arab Emirates form 50% of the regional fragrance market—has long intrigued fragrance and beauty brands. Saudi and Emirati consumers have a sophisticated understanding of fragrance and deep knowledge of perfume rituals. This reflects the cultural predilection toward scents and the traditional use of perfume. Saudi Arabia is projected to grow its beauty market even further in the coming years, and by 2018 the market in the Middle East is projected to be valued at \$43 billion.

Olfactively, there has been a shift from the heady, overpowering scents to lighter, fresher creations. This blend of East and

West can be a source of much inspiration for the creators, both domestically and abroad. One of the most enduring trends of the past few years has been oud, or agarwood. This precious resin is beloved in the Middle East for its complex aroma of tobacco, leather and chestnut honey. Oud collections like those of Tom Ford or Maison Francis Kurkdjian aim as much to give an unusual scent experience to the consumers in the West as to entice perfume lovers in the Middle East.

### What is the role of perfume if not to add a touch of beauty and pleasure to the most ordinary day?

In Latin America, beauty rituals are likewise important, but capturing this consumer requires a completely different approach, both in terms of olfactive profile and distribution patterns. Rapid growth in the region, a vibrant market for beauty and fragrance products, and high demand for quality products coincide with the challenges posed by import authorization and high taxation. There has been a boom in the local brands, which have to stay competitive in terms of pricing, but also offer luxury alternatives. In contrast to the opulent blends preferred in the Middle East, Latin American consumers favor fresh florals, aromatic and fruity notes, and they are likely to respond to innovative formulas that leave a cooling effect on skin.



The future is about how the industry balances its decisions, not only in terms of profit, but also with regards to its impact on people and the environment, said Saori Dubourg (BASF), center, during a panel that also featured, at left, Jonathan Warr (Takasago) and, at right, Mickael Blais (Givaudan).



In Latin America, beauty rituals are important, but capturing this consumer requires a completely unique approach, noted a panel featuring, from left, Danielle Bibas (Avon Cosméticos Ltda.) and Fanny Moreau (Mon Absolu).



"When you peel an orange you get more limonene and citral on your skin than you do from a fragrance," pointed out Michael Carlos (Givaudan) during a session that also featured, from left: Thomas Tindemans (H+K Strategies), Charles Cronin (University of Southern California Law School), Claire Guillemain, Expert for Trade Secrets, IP and EU Advocacy) and Florina Telea (Policy Office, Legal Adviser, European Commission).



The Middle East—in which Saudi Arabia and United Arab Emirates form 50% of the regional fragrance market—has long intrigued fragrance and beauty brands, noted a panel that featured, from left, Izkaskun Bengoechea (Euromonitor International), Jayram Joshi (Eurofragrance), Kate Williams (Seven Scent) and Irina Barbalova (Euromonitor International).

Any market new to the fragrance brands presents its own challenges, but a focus on channel priorities, value proposition and local tailoring will always be essential.

## The Impact of Sustainability

With environmental and health issues shaping the global governmental and business agenda, sustainability is a topic that no fragrance company can ignore.

As Saori Dubourg, president of the Nutrition & Health division at BASF, said, the future is about how the industry balances its decisions, not only in terms of profit, but also with regards to its impact on people and the environment. Players, both large and small, can contribute, and while businesses may operate sustainably in different ways, the main conclusion of the WPC conferences on the topic was that it is as relevant and important as ever.

Sustainability creates its own innovation needs, and different companies choose different avenues, with most favoring strong investments into R&D. A company may explore biotechnology to get higher yields of raw materials or invest in molecular biology and genetics. Many study the lifecycle of materials and develop tools to better select within the existing options.

Companies can create ethical sourcing programs that prioritize sustainable practices for growing materials and offer technical and financial assistance to farmers.

The major issue for most sustainability initiatives is the price. There is no denying that many sustainable technologies and ingredients often cost more, and changing the economic motivation of the clients is not always easy. Balancing price concerns with the goal of sustainability is a constant dilemma for companies, especially in light of the economic pressures on many businesses today. In the emerging markets, the price point is an even more sensitive issue, with entirely different constraints shaping the decision-making.

The consensus of experts at the WPC was that the industry needs leaders to speak out on sustainability issues and to educate its customers. Messaging about how companies are developing a new technical platform that will preserve the environment and biodiversity is important. Since climate change issues are currently front and center of the environmental debate, this can be tied into sustainability. For instance, as Bernard Toulemonde, general manager of IFF-LMR Naturals, noted, the Nagoya protocol ([www.cbd.int/abs/text/](http://www.cbd.int/abs/text/)) forces companies to deliver information on how they protect



The final day of the conference featured talks from (left to right) Michael Carlos (Givaudan), Patricia de Nicolai Michau (l’Osmothèque) and Sarah Bensadoun (Fleurs d’Exception du Pays de Grasse).



From left: Paul Laroue (tru fragrance) and Francois Duquesne (Fragrance Republic LLC) discussed new strategies for reaching consumers in a multichannel world.



Conference speakers provided exotic and classic scents for attendees.



On the show floor, from left, Veronique Rossow (Phytotrade Africa) and Michel Mane (Mane).

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biodiversity, and fragrance brands in turn can communicate this to their consumers.

But focusing too narrowly upon sustainability indices and lifecycle analyses misses out on the crucial component of human capital, according to the WPC experts. This is especially relevant for natural raw materials that are often outscored by their synthetic counterparts on existing indices. The jobs that agriculture generates and the extra industries it supports (such as French honey production made possible by the lavender fields) make them an important source of income in the local and national economies.

As the debate on renewability continues, it is important to consider that many natural perfumery materials have the hallmark features of sustainable agricultural products and fit well into environmental programs. Since most don’t require fertilizers or rich soil, they don’t compete with food crops and can be used in conjunction with sustainable agricultural practices. Growing natural raw materials sustainably means not only

filling the perfumer’s palette with exquisite essences, but also protecting local heritage and traditions and supporting farming communities.

### New Ingredient Development Challenges

One of the most critical challenges to perfumery remains the ingredients. While the need for sustainable naturals is as acute as ever, the synthetic palette is shrinking. In contrast to previous decades, the pace of new molecule introduction has slowed, while the costs of testing materials have increased. Since ingredients can be a rich source of inspiration for perfumers, fewer new materials means fewer olfactory innovations and fewer ways to differentiate one’s style and signature.

Regulatory discussions are still in progress and their final outcome will become apparent only later in 2014, but it is already clear that developing high-performing molecules forms the core of research investments. This development comes in conjunction with the fragrance industry’s current focus on technical delivery, sensory perception and market research.

### Changing Role of the Perfumer

Another challenge—although under the right circumstances it can also be a source of creativity—is the changing role of a perfumer. Even in the last decade, perfumers have seen their responsibilities and visibility evolve to an unprecedented degree.





From left: Nicolas Mirzayantz (IFF) and Anneliese Wilsch-Irrgang (Henkel).



The Nagoya protocol forces companies to deliver information on how they protect biodiversity, and fragrance brands in turn can communicate this to their consumers, said Bernard Toulemonde (IFF-LMR Naturals), at right, who spoke on a sustainable ingredients panel with, from left, Jason Kelly (Ginkgo Bioworks), Torsten Kulke (Symrise AG) and Boet Brinkgreve (Firmenich).



Patrick Firmenich (center; Firmenich) and Kedar Vaze (at right; SH Kelkar).



From left: Xavier Renard (IFF) and Ruth Sutcliffe (Coty).

Traditionally, perfumers worked behind the scenes, in relative isolation, which helped them form their own unique style, but also limited their interaction with other industry actors. Today, creators need to be inventive and technically skilled in different areas of perfumery. The briefs are much more numerous—but the rejection rate is higher, too—and it is essential to know how to prioritize and work as part of a large team.

But the positive aspect of the changing perfumery role is that, while the number of projects an individual perfumer handles has increased, so has the availability of new tools. At their fingertips, perfumers have market research, consumer studies, regulatory information and many other data to complement their own creativity. Investment in training future perfumers is as essential as ever, emphasizing the changing nature of the perfumer's job, the palette of ingredients and client expectations.

### Allergens and Consumer Perception: Regulatory Realities

Since December 2011, when the Scientific Committee on Consumer Safety (SCCS), an advisory body for the European Commission, made a proposal on the usage of fragrance ingredients, the topic of regulation has been one of acute concern. On February 13, 2014, the SCCS published its findings, which

recommend banning three allergens (hydroxyisohexyl 3-cyclohexene carboxaldehyde [HICC], atranol and chloroatranol) and increasing the list of allergens from 26 to 89. While the shape of the final EU directive has yet to be determined, the industry has already been under scrutiny.

The fragrance industry has self-regulated since 1973, when it formed the International Fragrance Association (IFRA), but with growing demands for greater transparency and accountability, its methods have been put to the test. Strong pressure is felt from consumer groups and regulatory bodies to assess the effects of perfumery ingredients. As Julie Girling, Member of the European Parliament, explained during the session titled “Building Consumer Confidence through Effective Risk Management,” political representatives are asked to manage risks, and the challenges of this endeavor to the industry are becoming clear as the regulatory debate unfolds.

One of the critical elements is the need for robust methodologies on which the different parties must agree. The difficulty of testing materials is that there are few precise tools, and an element of judgment is involved. As toxicologist David Basketter said, “Ask five scientists and you will receive five different answers.” Scientists disagree on methodology, and the industry and non-industry scientific bodies come to different conclusions.



*From left, perfumers Jordi Castells (Robertet) and Emilie Coppermann (Symrise AG) discussed creativity and the changing role of perfumers.*

On the other hand, even if there can be no absolute certainty, consumers need information and tools to make informed decisions. In Girling's words, "When consumers know about risks, when they can access relevant information, they can judge for themselves how to manage risks, but today when it comes to perfume, they don't have the relevant data."

In the end, it is the responsibility of the industry to provide such information in an accessible and understandable format.

Another important element is the cooperation among different players in both developing a robust methodology for testing ingredients and in responding to the pressures from consumer and regulatory bodies. The EU proposal has been a major impetus, and in 2012, IFRA proposed a cooperative approach which engages the various stakeholders to address issues surrounding fragrance allergens in cosmetic products. The IDEA Project (International Dialogue for the Evaluation of Allergens) was born to develop a common framework to understand the materials and standard methodologies for testing.

Of course, the question remains as to how far the regulations will go and at what point reasonable concerns become irrational. As Michael Carlos, president of the fragrance division at



*From left, perfumers Rafael Trujillo (P&G) and Jim Krivda (Mane) discussed the state of the art of perfumery.*

Givaudan, pointed out, "When you peel an orange you get more limonene and citral on your skin than you do from a fragrance." So, should oranges be labeled too?

Above all, it is clear that the regulatory political environment can be an obstacle, and the industry needs to be proactive to address the issue before it becomes a problem.


There is no doubt that today's perfumery industry professionals face many pressures and constraints, but it is too early to say that the golden days have passed. Some challenges require much work and effort to overcome, as highlighted by the various WPC discussions, but others can be a source of creativity, inspiration and, ultimately, growth.

*For more information on this and future conferences, visit [wpc.perfumerflavorist.com](http://wpc.perfumerflavorist.com).*

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