

# Enhancing & Personalizing the Fragrance Experience

How sensory and technical innovations in laundry and air care are reshaping consumers' scent spaces.

**F**ragrances mask chemical ingredients, support brand identity, signal cleanliness, and provide an overall sensory experience for the consumer. According to Euromonitor ([www.euromonitor.com](http://www.euromonitor.com)) figures, home care fragrances for laundry detergents, fabric softeners, air care, dishwashing and surface care represent more than three quarters of the total fragrance volume sold annually, and will grow at 2% per year through 2018. Euromonitor notes, "Asia Pacific and the Middle East and Africa will be the fastest growing regions for fragrances over 2013–2018, with forecast CAGRs [compound annual growths] of 4% and 3%, respectively."

Fabric softeners and air care, which rely on fragrance delivery as core assets, represent the greatest innovation areas in home care, according to Euromonitor. In boosting performance, and enhancing and personalizing fragrance experiences, the fabric care and air care segments reflect a shifting consumer dynamic.

## Boosting & Personalizing the Sensory Experience

"The advent of technology and encapsulation into the [fabric care] category has had a huge impact on consumers," says Stephen Nicoll, creative perfumer at IFF. "It really raised the bar for consumer expectations for performance from the fragrance. Through the use of the technology, we were able to deliver more of the fragrance experience at the dry fabric stage and on damp. Because of that, the consumer has become more aware of the effects of the fragrance at that stage."

This, he says, has created an expectation from the consumer that they can have something "different," leading to the introduction of more sensorial fragrances into the category, rather than merely traditional functional scents.

"The sensorial fragrances are becoming more prevalent and popular," Nicoll says.

This has allowed perfumers to use a more diverse range of notes, while also incorporating new technologies for performance/delivery.

"Because of the improved performance we're getting through the technology, consumers began to expect more," says Nicoll. "When you deliver something to the consumer that's new and interesting, it becomes the norm. And then they [consumers] are looking for the next benefit. In the category, we were delivering more through the encapsulation technology. In order to deliver more of an experience to the consumer, we started to see things like ... the [laundry] scent boosters and crystals. These are ways to deliver more fragrance experience to the consumer."



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Air care and beauty scents, which may have had a cosmetic or feminine connotation in the past, have migrated into laundry care fragrances, boosting sensorial product facets. To a lesser extent, other sensorial innovations have come from within the category, designed specifically for the application.

Looking to the future, Nicoll says, "The biggest thing I've seen is that the consumer is becoming more aware of the variety of the products available to them; they are looking more and more to personalize their fragrance experience."

For instance, a consumer might use a detergent in combination with a fabric softener, to which they may add a laundry scent booster or scent crystals, followed by, perhaps, a dryer sheet.

"In doing that, they create their own fragrance cocktail from the products that are available," says Nicoll.

As consumers mix and match products to their taste, they are in effect customizing and personalizing their scent experience.

Nicoll explains, "The challenge for us as creators is that consumers are going to have many different products that they're going to combine together; we will have to make sure that the

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product we give them is going to deliver a positive fragrance experience that the consumer loves.”

Formulating to avoid fragrance “clashes” while ensuring that products have distinctive and high-performance scents will be a creative hurdle facing many perfumers.

## Redefining Space with Scent

Air care scents are redefining spaces in the retail world, says Lauren Salisbury, senior fragrance evaluator at Arylessence. It’s becoming architectural, she says, virtually 3D. Salisbury provides the classic example of Abercrombie & Fitch, which projects its signature scent, *Fierce*—and thus its brand—out the door, expanding its presence beyond the store’s physical confines. On the consumer side, people create their own personal scent bubbles with personal fragrances and products like car air fresheners. Salisbury notes that people’s scent spaces are larger or smaller depending upon cultural norms, but no matter the size, scent provides a form of 3D communication.

Retail-style air-care products aren’t widely available to consumers, though some hotels offer variations of their signature scents to the public. The real challenge with translating such systems in the home are the significant regulatory impediments involved.

In the business-to-business sphere, meanwhile, the general acceptance of scent branding is growing, says Salisbury. She adds that she has been surprised by the appetite both in the United States and Europe for gourmand scents and heavy woody notes.

Salisbury continues, “I think malodor technology is going to become increasingly popular [in scent branding]. As consumers become more and more aware of fragrances in their spaces, there’s going to be more of a trend for [malodor technology].”

Conversely, she says, scents for retail spaces in the Middle East are a challenge because of the strong desire for more impactful, heavier and spicier fragrances. Keeping that intensity in a large space is a significant hurdle.

Scenting environments such as hotels, gyms and retail spaces is certainly on the rise, says Kari Arienti, vice president, senior perfumer, Symrise.

“The opportunity to do amazing things is there,” she says. “It really helps with the [consumer] experience. If I go into a store that doesn’t smell good, I’m gone.”



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## Ripe for a Change

The air care space is highly saturated, offering opportunities for small entrepreneurial companies with unique technologies such as the flameless wax melters/candle warmers. Meanwhile, candles, aerosols, plug-ins, reed diffusers and other established air care product categories are at various stages of maturity and face challenges from safety or sustainability perspectives. It’s clear that the market is ready for a new, potentially disruptive delivery system. Ideally, a new system would overcome some of the downsides of existing technology. For instance, it would likely be flameless, deliver full-bodied fragrances and accommodate a wide range of ingredients for a diverse range of sensory effects.

The flameless candle category is a significant new opportunity, says Frank Lucia, vice president of R&D at Mane, though candles aren’t entirely easy to replace. Paraffin wax, for example, is a highly non-polar medium that gives greater and more consistent fragrance delivery performance. (Aerosols have a similar fragrance performance profile.)

“Candles are more than fragrance-delivery vehicles,” says Lucia. “They provide ambiance, a soothing sound, a visual, a light, a home décor aspect.”

A successful candle alternative will have to address some, if not all of those facets. Product developers have responded with air fresheners that incorporate LED lights and even audio effects. But today, the wax melters/candle warmers are the one alternative on a distinct upswing.

Lucia traces this change back to the economic collapse of 2008–2009. Then, many products, including candles, faced challenges as product developers attempted to make products for less and less money. Consumers eventually pushed back, demanding higher quality. Premium, prestige and niche candles filled the quality vacuum, but were perhaps financially out of reach of some consumers. This is when masstige candles bridged the gap between high-end and value, Lucia says, thus gaining significant market share.

Wax melts present a viable alternative, offering value and a décor aspect. However, they do not have the fragrance throw of combusted wax in a traditional candle. If the melted waxes could be recycled or reused, consumers seeking green products



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could be further motivated to make a purchase. That said, Lucia explains that wax melts are likely a transitional technology that will eventually yield a further iteration of scent dispersal systems.

Meanwhile, reed diffusers have faced declines over the last several years due to the presence of a solvent and the relative inefficiency of reeds as a delivery system for full-bodied scents. Mane, for instance, developed a water-based solution for reed diffusers to address these toxicity and spill-hazard issues, which provided the increased linear fragrance performance consumers expect.

Lucia notes that despite the growth of air care alternatives, candles will continue to sell well, if not grow strongly, in coming years. He specifically cites the rise of designer, artisanal and small-batch candles as a prime driver of this market. These entrepreneurial brands want high-quality fragrances and are using alternative waxes such as avocado, coconut and beeswax.

Again, décor is crucial. Lucia says that candle makers are employing decorative shapes, elaborate glass containers, custom tooling and more to drive this market sector.

“Fragrance is the ultimate deciding factor,” Lucia explains, “but if the décor aspect is not there, we find that the consumer just doesn’t have the purchase intent.”

This opens the door for high-end, upscale brands to take packaging to the next level.

Meanwhile, Lucia and his colleagues are exploring methods for improving fragrance delivery in candle media, including clear candle technologies with visual aspects and performance additives that can be blended within traditional waxes to provide a scent boost and competitive edge.

Beyond strong scent throw, candles offer perfumers a large palette of fragrance materials to work with. Other delivery systems have technical challenges that shrink the available palette. Arienti explains that the ingredients that can be applied also decline when formulating for the EU allergen rules.

For many premium products, consumers expect to have their house transported by scentscapes, says Arienti, who has traveled as far as Tasmania to discover unique fragrance notes to apply to products. While some offerings are highly focused on combatting malodors and are thus functionally positioned, premium sensory products are about creating a mood or specific environment in the house. Arienti says that what a consumer would select for the home may differ significantly from the scent they would choose in a body care product. For instance, a consumer using fruity-floral body care might scent their home with a citrusy or luxurious oriental scent.

## Year-round Seasonal & Sensory Trends

Coconut in winter? Holiday scents tend to be rather similar from year to year, says Salisbury. However, she’s noticed a new crop of seasonal air care scents that call for something unexpected. During the winter holidays, for instance, a customer may include a tropical-skewed scent in its product mix. Those variants point to the possibility that holiday scents could one day reach beyond the traditional months. Today, when working on seasonal lines, Salisbury says she often considers including variants that offer a new or off-season twist to the usual offerings.

Lucia has seen air care customers introducing profiles such as pumpkin spice in the summer months, which he says has been a successful strategy. Wintry scents like fir, evergreen, balsam, pine and peppermint are now being sold at other times of the year.

“We’re trying to put a little bit of that seasonality back in those seasonal-specific fragrances,” says Lucia. “When it comes to a pumpkin spice [scent], we might want to create a pumpkin spice that’s a little more applicable to the spring, versus fall.”

With the demographic shifts in the United States, perfumers have more freedom to formulate an expanding range of tonalities, says Arienti. Air care lines in the United States continue to include variants such as apple, pear and seasonal pumpkin, but also Latin American notes such as guanabana, mango and guava, which offer new accents. While bourbon emerged as a key food and beverage trend in recent years, fragrances have picked up some of the spirit’s complex vanilla and wood notes. Even twists on ouds and other Middle Eastern scents are finding their way into the US market.

Meanwhile, says Arienti, rose and orris have come back in force. While they haven’t yet dominated air care, they are emergent. Today’s rose is plummy and full, Arienti explains, and may sometimes be modified with peony notes.

However, the popularity of natural notes presents its own problems, says Arienti, particularly in light of European allergen requirements. While that market would like to see candles and air care products be as natural as possible, the >5% fragrance load of many products cannot accommodate the necessary ingredient levels.

Whatever the challenges, Arienti says, the innovation in air care will continue.

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