

Fragrance for Today—and Tomorrow?

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I feel presumptuous in preparing to talk about fragrances before an audience that's far more expert and experienced than I am in this field. However, during my 37 years with The Procter & Gamble Company, I've continually dealt with the development of products for which perfume was *one* of the critical elements for success.

As one of the largest consumers of these materials, P&G places enormous importance on the use of perfumes and fragrances. Therefore, the testimony that I have to offer comes from clear convictions, backed up by the concrete action of buying the products you create, manufacture, sell, test, or regulate.

In the 30 year span from the first to the 10th Congress, there's been an enormous growth in the use of perfumes for functional products to the point that these products now consume 1.5 billion dollars worth of fragrance materials. This accounts for more than two-thirds of the growth in the fragrance industry over the past three decades, and now represents about 70 percent of the sales.

Procter & Gamble markets consumer goods worldwide with greater than \$15 billion dollars in annual sales. We count on fragrances in our products to make them vital and acceptable to consumers. In the United States alone, we market over 125 different brands. If we exclude edible and bulk products, approximately 95% of

these brands utilize a perfume. These perfumes may be compounded within Procter & Gamble or in one of the perfume houses that supply us, but the raw materials for all of these materials come from people who are represented at this 10th Congress.

Worldwide, we manufacture over 25 million pounds of in-house finished fragrances annually. If you add this in-house consumption to the finished fragrances which we purchase, I think it's fair to conclude that we are one of the largest users of fragrances in the world.

Why do so many consumer goods products contain perfume? The answer is very simple. Because the consumers want it. Our customers utilize our products in their every day activities, and it is our desire and our mission to provide functional products which meet the customers' needs for performance and aesthetics. The acceptability and performance of these products are really measured by the five senses.

People *look* at clothes to see whether the laundry is white and spot free and not wrinkled; they look in the mirror to see whether their hair has an attractive appearance.

They *feel* their hair to make sure that it is soft and they are concerned that their skin is smooth, that the face was closely shaved, or that slips don't cling, and the towels are soft and absorbent.

They *listen* to products. They listen for the rus-

tle of taffeta or the snap of static when they are pulling socks apart from the dryer.

Taste is also important in our products, but since I'm going to dwell on the fragrance rather than the flavor aspect of our business, I'll pass that sense by.

That brings us finally, last but not a bit least, to *smell*. People evaluate the efficacy of our products based on the use of their nose. They check to see if shirts and towels smell clean, if the room or closet smells fresh, and if the skin and hair smell the way they should. In some products, the smell is a primary reason for choosing a particular brand. Colognes are chosen on the basis of the pleasant aroma in use. Bar soap selection includes consideration of how the bath or shower will smell. The whole issue of the effect of smell on a person's attitude is currently very much in vogue with the discussion of "aroma science" and popular articles like the recent feature on the sense of smell in the *National Geographic*.

So in net, the consumer evaluates the effectiveness of our products based on the evidence accumulated from their five senses. Every one of these senses contributes to the total impression, and fragrance is clearly one of the most important.

Perfumes In the Laundry

It's interesting to follow the evolution of the appearance of products designed for use in the laundry from the perspective of fragrance and odor. The real revolution of synthetic detergents occurred way back in the 1940s. Synthetic detergents replaced soap granules. Not only did they eliminate problems of curd and scum caused by hard water, but they also didn't go rancid and they smelled better. Detergent products were more pleasant and the washing solution no longer had unpleasant soapy odors. Right from the beginning detergents have been perfumed lightly to make them more pleasant and make them attractive in use. In the 1960s, Procter & Gamble started adding residual perfume materials to Tide and other products to extend that pleasant smell from the washing powder and the washing solution onto the clothes after the wash was completed. The whole development of synthetic detergents has had an ongoing and evolving element of satisfying consumers' odor requirements.

In the 1950s, fabric softener products appeared on the scene. These offered three benefits.

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First they conditioned the fabrics to make them *feel* good, supple and soft.

Secondly, they eliminated static problems that developed as line drying gave way to automatic dryers and synthetics replaced cotton.

Third, they enhanced the odor on clothes and the odor in the drying operation to make, again, both the washing process and the clean clothes more pleasant.

In essence, fabric softener benefits were dealing almost entirely with sensory benefits and the pleasure in use of the fabrics resulting from the washing process.

Later on, in the '70s, dryer-added fabric softeners arrived. These provided a different balance of benefits reflecting the lessened need for softening due to the mechanical action of the dryer and improvements in fabric finishes. However, there was greater need for static control and also a greater opportunity to provide benefits of fragrance to finished clothes.

A series of laundry related products have been developed to allow the cleaning and treatment of clothes, and successively the importance of fragrance has increased as these products have evolved. This, I think, reflects that once basic functional benefits are satisfied, people move to a higher plane of product attributes which are more directed toward the quality of life. Modern products are designed to make life more pleasurable. As more basic needs are met, the consumer sets higher standards for performance, with aesthetics becoming more important, and sophistication of end results becoming the norm. Fragrances play an important role at this latter stage of development.

We can follow a similar evolution of products in the household cleaning area where harsh disinfectant-type products have given way to pleasant odors which are associated with cleaning, lemon being a key example. This has evolved to more subtle odor control mechanisms for malodors using accords of counteractants and perfume ingredients, and on to the products currently available for perfuming the total environment of a room, all the way to the litter box! At this point, the consumer has an opportunity to select the fragrance for the air in the home. This can become a personal expression of personality, mood, or occasion. Once again, as product functional excellence has improved, the importance of aesthetic excellence has increased and fragrance ultimately looms as an important final contributor to acceptance and selection.

I won't repeat this analysis in other areas, but the same sort of thing has happened in a multi-

plicity of consumer goods categories, whether it be skin care, hair care, or the facial tissue that you put to your nose when you have a cold. Products and product categories are like living things, they either grow and prosper, or they die. Growth, in this sense, means providing better value, new benefits and greater satisfaction to the consumer.

Requirements for Quality Products

The totality of all these changes is that the consumers become more sophisticated and our aesthetics must also become more sophisticated to meet the consumers' needs. We can already see further segmentation developing. Men want different scents than women. Some people want perfumed products, and some want unperfumed products. There is interest in more subtle fragrances, and there are issues of clashes between perfumes in various products. These clashes differ, depending on the particular group of products consumers use. If one is perfuming a woman's skin care product, it is necessary to provide just the right level of fragrance to provide satisfaction with the end result, but not so much that the resulting odor will linger and affect the woman's ability to select the fine perfume that she wishes to wear.

The common link in all this is the insistence of the consumer on *quality products*, well designed and executed, to meet sophisticated needs. The fact that fragrance is an important element of product quality has been good for the fragrance industry as well as for marketers of consumer goods. It has also brought additional responsibilities. A key responsibility has been to ensure that the products and the ingredients are safe. The industry has put enormous effort into ensuring that perfume ingredients are safe. In particular, in the synthesis of new fragrance chemicals, exhaustive testing has been done to develop satisfactory reassurance of the *safety* and reliability of these materials. I'm told that the cost of providing a safety pedigree for a single synthetic chemical can be well in excess of a million dollars. This is expensive, difficult and time-consuming work, but it's been absolutely necessary to ensure that the products we provide are suitable for mass markets, and for mass use. The industry has handled this well and very responsibly.

Another requirement for the broad scale use of fragrance ingredients in consumer products has been *reasonable cost*. Consumer products are not expensive, some of their chief requirements being that they provide good value and a good cost-benefit ratio. This applies to the perfumes that go into them as well as other ingredients. For-

tunately, the industry has risen to this challenge to keep costs affordable through the development of effective synthetic fragrance ingredients which have made these fragrances cost effective, and thus has paved the way toward broader utilization of these products in the consumer goods industry.

The fourth requirement in the use of perfume of any other ingredient in consumer products is *reliability of supply*. Ingredients must be available in the quantities that are needed, when they're needed. They must be uniform and conform to the customer's requirements. Again, this need has been importantly affected by the availability of synthetic materials which reduces the impact of natural variations among crops and from year to year.

Finally, as consumer goods products have evolved and become more complex and sophisticated, the challenge of *fragrance stability* has become increasingly important. It is necessary that the fragrance be compatible with the product and deliver its intended benefit despite the ravages of distribution conditions around the world, conditions of storage, multiple usage conditions, exposure to sunlight, plus the interaction of the fragrance with the product itself. Certainly in the detergent business this interaction can result in extremely significant challenges due to the complexity of the specialized ingredients that are used to obtain specific cleaning results. Detergents contain bleaches and organic materials of all sorts. Some cleaning products may be highly alkaline or acidic. In addition, the desire for fragrance materials which will survive the washing process and later deposit on clothes adds another important dimension to the challenges to find materials which are stable and functional in the context of the product in which they are used.

Therefore, our present situation is that fragrances in today's products need to be not only attractive to the consumer, but also safe, cost effective, readily available in large quantities, and stable under a variety of conditions. However, the title of my talk was *Fragrances for Today . . . and Tomorrow?* So that means that I'm going to have to deal with the future. What will the future bring? The answer is very simple, and a repeat of my earlier statement—it is going to bring whatever the consumer wants. The choices that the consumer will have available are going to be limited only by the ingenuity and creativity of people in this room and those that they work with in creating new materials and new combinations. What will be *used* will be those creations that are responsive to consumer interest and desire.

Fragrances for the Future

So, what will the consumers desire? What kind of fragrances will they want in 1996? I wish I had a crystal ball and could tell. But I do believe that the consumer will still want to satisfy those five senses that we talked about. The consumer will continue to want pleasant surroundings. However, the definition of what's pleasant will change and evolve with time. And there will be new generations of products that don't exist today, with new compatibility challenges. And these products will contain fragrances. In fact, there will be a greater variety of choices available, with lightly scented as well as heavily scented products, in addition to different scent characters. The consumers' choice will be broadened.

Also consumer concerns are going to act as constraints. It's clear that the consumers are interested in things that don't harm the environment. In particular, they are concerned about things that affect their own personal environment—the things that they touch, things that they breathe, things that surround them. We're going to have to be careful that we maintain and enhance the safety control that has marked the past, and enlarge upon those efforts to include not only safety to the individual, but also safety to the environment.

Another factor that seems to be developing is a greater interest in the source of materials. People like things that are natural and pure and healthful, and this is going to have an effect on the fragrance industry. I think it will change the emphasis from chemistry to purity, quality, and natural ingredients.

The industry, both the producers of fragrances and the consumer goods companies which provide products containing fragrance to the consumer are going to have to continue to ensure that the safety of the consumer is protected, that the quality of products is guaranteed, and that perfumes offer good consumer value and don't have an inappropriate effect on cost. In addition, we going to have to be responsive to the interest in natural, pure and healthful ingredients, all of which is going to change the nature of the industry. Finally, and most importantly, we must ensure that public confidence is maintained in our products.

Close linkage is required between the suppliers of perfume, raw materials, essential oils, the compounders of perfumes, and those of us that formulate finished products. We are all links in a chain bringing materials from the corners of the earth, as well as from the ingenuity of the chemist's mind, to give satisfaction and plea-

sure to consumers of goods all over the world. We must maintain public confidence, if we are to continue serving the consumer as we have in the past, and thus prosper. Failure at any level will be felt by all. The chain is no stronger than its weakest link.

I have a pretty clear view of the future of fragrances at Procter & Gamble. We're going to continually strive to better understand and fulfill the consumers' desire for fragrance and results in our products, and we're going to ensure that the fragrance that we use evolve as consumer taste and preferences evolve. Hopefully, we'll be at the leading edge of those changes.

We are also going to work to guarantee the safety, quality, supply and cost of the perfume, and the ingredients in our products. We're going to do this by improving the specifications for materials and by improving our understanding of the source of materials. We're going to be reaching further back into the supply chain to ensure that our needs are clearly understood. In order to do this, we're going to be seeking closer relationships with our suppliers. We'll give more information—and we'll expect it to be treated confidentially. We want partnerships aimed at ensuring the success of fragrances in the products of tomorrow.

The Japanese have revolutionized the way one goes about producing consumer products through their approach to quality and the principles elucidated by Dr. Deming and others. One of the key factors in the success of these methods has been the dedication to excellence in partnership between what Dr. Deming call the "customers" and "suppliers." He views each link in the supply chain as a customer/supplier relationship in which the best interests of both parties are served by close collaboration. I think that we must apply the same approach to perfumes and fragrances with the expectation that it will allow us to provide better value to the consumer, both in providing functional benefits as well as cost effectiveness, but most importantly in maintaining public confidence in the integrity and appropriateness of our products and the benefits they deliver.

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