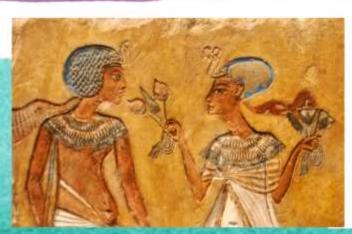




FRAGRANCE OVER THE CENTURIES















THE OVERTURE







Signature Ingredients & Fragrances that Defined Our Industry

A history of success through disruption

How they shaped our industry

The Sociocultural Background to Successful Fragrance Design

How trends affect fragrance preference and creation

Current macro-trends and their impact on the future of fragrance development

Leaving Your Signature on an Uncertain Future

Challenges to navigate

Disruption through creativity



SYNTHETIC CHEMISTRY'S EFFECT

ON MODERN PERFUMERY











Early 1900's



Table 1. Percentage composition of the essential oils of Aeolanthus sucreolens Mart. ex Spreng

Compounds ^a	Leaves Sample A	Flowers Sample B	RJh	Identification ^e
(-)-linalool	22.5	21.6	1098	GC-MS, co
(+)-linalool	12	14.3	1098	GC-MS, co
finaloof acetate	5.7	6.8	1255	GS-MS
ox-santalene	1.9	2.8	1418	GC-MS
α-bergamotene	0.9	1.4	1414	GC-MS
(E)-B-farmesene	25.4	29.1	1458	NMR, GC-MS
(-)-massoialactone	25.9	17.0	1476	NMR, GC-MS
TOTAL	94.3	93.0		

*Compounds listed in order of elution from a SE-54 column; bRetention indices determined on apolar SE-54 column (50-250 °C; 4 °C min⁻¹); 'Identification: RI, GC-MS, gas chromatography-mass spectroscopy; NMR, nuclear magnetic ressonance.





Mid-Late 1900's

MARKET DISRUPTION

"A disruption displaces an existing market, industry, or technology and produces something new and more efficient and worthwhile.

IT IS AT ONCE DESTRUCTIVE AND



Clayton Christensen Harvard Business School Professor

DISRUPTING

THE "NATURAL" ORDER



Rose Absolute: \$1,000-\$3,600

Geraniol: \$16.00

Phenyl Ethyl Alcohol: \$4.00

Citronellol: \$16

Rose Oxide: \$120



Jasmine Absolute: \$3,500

Cis Jasmone: \$200

Lactone of Cis Jasmone: \$600



"One has to rely on chemists to find new aroma chemicals, creating new original notes. In perfumery, the future lies primarily in the hands of the chemists."

> Ernest Beaux Chanel 5 perfumer

SIGNATURE PERFUME INGREDIENTS

CREATING MOLECULAR MELODIES

Reliable price, availability, quality.

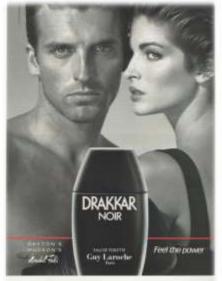


Ability to use higher levels of individual odor components rather than complex mixtures.

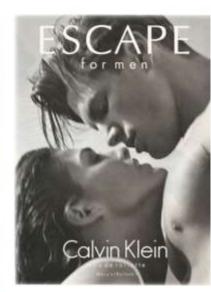


New space for creativity and innovation.









SIGNATURE FRAGRANCE & INGREDIENTS CREATING MOLECULAR MELODIES

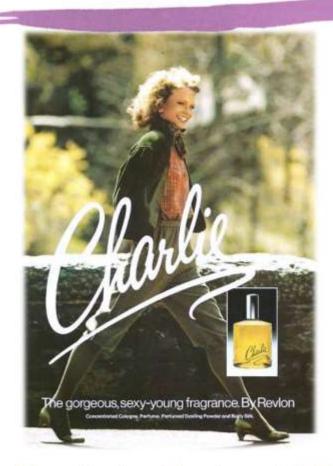


Beautiful by Estee Lauder (1985)

"The Fragrance of a Thousand Flowers."

Created using
Iso E Super
as a signature ingredient.

SIGNATURE FRAGRANCE & INGREDIENTS CREATING MOLECULAR MELODIES



A floral aldehydic fragrance created using Lactone of Cis Jasmone, a Bedoukian specialty, at high levels.

Created using Lactone of Cis Jasmone as a signature ingredient.

Charlie by Revlon (1973)

THE ORCHESTRATION

To formulate successfully, you need to understand current trends, sociocultural influences, and challenges present in the market.



"Creativity can happen anywhere. You never know what may have appealing combinations and what may inspire you to develop an irresistible fragrance.

EXPLORE. EXPLORE.





SOCIOCULTURAL TRENDS

THE EVER CHANGING METER



What's going on in the world today



Trend Spaces: wellness, nature, creativity, humanity, luxury



How the time periods of each trend reflected perfumery

FRINGE TO MASS

EXAMPLE: THE DEVIL WEARS PRADA - THE LIFE CYCLE OF CERULEAN BLUE



"In 2002, Oscar de la Renta did a collection of cerulean blue gowns...and then I think it was Yves Saint Laurent---wasn't it? –Who showed cerulean military jackets... and then cerulean quickly showed up in collections of eight different designers... and then it filtered down through the department stores... and then trickled on down into some tragic Casual Corner, where you no doubt fished it out of some clearance bin."

TREND SENSING DISCOVERING UNEXPECTED HARMONIES

UNCOVER THE HIDDEN

DECIPHER

ASK THE RIGHT QUESTIONS

CREATE SCENARIOS & STRATEGIES HOLISTIC SENSORIAL PROPOSITIONS

- Watch signals and connect the patterns; Sorting out shiny objects
- Pind fringe by casting wide net, then show relationships; Patterns, connections, often unusual suspects
- In-depth sensing of sociocultural shifts and more breadth/depth into initiative influence

NOTEWORTHY

TREND DRIVERS



Overwhelming fear and uncertainty

Renewed desire for wellbeing and mindfulness Broadcasting of visual dialogue & points of view

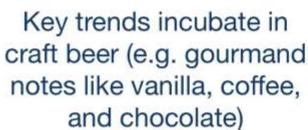
TIMELY INDICATORS

CUE DEMAND FOR VISCERAL, OLFACTORY EXPERIENCES

SHIFT	DESIRE	REMEDY
TERRORIST ATTACKS (9/11)	COMFORT & FAMILIARITY	VANILLA/GOURMAND
COMMUNICATION PROLIFERATION (SMART PHONES)	BOUNDARIES & MINDFULNESS	LAVENDER
POLITICAL UPSETS (US 2016)	REASSURANCE & AUTHENTIC SWEETNESS	MANUKA HONEY
HUMAN RIGHTS VICTORIES (LGBT)	INDIVIDUALITY & CULTURAL EXPOSURE	YUZU, GINGER, TURMERIC
CRISES & SCANDALS (FLINT WATER, VW)	TRANSPARENCY & PURITY	WHITE STRAWBERRY
NON-TOXICITY (J&J BABY POWDER)	SAFETY & TRIED AND TRUE	GINGER, LEMONGRASS, LAVENDER, ROSE

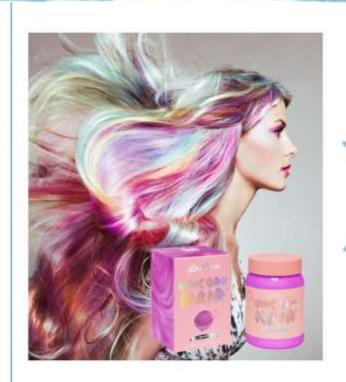
CASCADE STRATEGY THE IMPORTANCE OF INDIE BEAUTY







Find way into mainstream (e.g. Budweiser Vanilla Bourbon Cask)



Key trends incubate in Indie Beauty (e.g. unicorn hair, mermaid hair, oil slick hair)



Find way into mainstream (e.g. L'Oreal Colorista semipermanent hair color)

CASCADE STRATEGY THE IMPORTANCE OF INDIE BEAUTY









BIG TREND SPACES





NATURE

1967



Pachel Carson publishes "Silent Spring" this year. 2001



Following a political campaign of "agrarwende" (agricultural major shift). Germany establishes 2006



"An Inconvenien Truth" is release 2008



To put an end to faux-Parmesan cheese European courts decree that only Parmesan made in Parmigiano-Reggiano can legally clam the povenance. 2011



The Fukushima nuclear disaster releases radioactive waste into the global water and air supply. 2014



"World Wide Opportunities of Organic Farms," begin asking for volunteers to exchange a hard days work on a farm for free lodging and food. 7016



Flower Jelly lipsticl containing actual blooms, go viral or Instagram.

The global Slow Food movement originates in Italy, advocating for local, traditional cuisine and sustainable food production.



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2007

China seeks quick for solutions to eliminate air pollution before the 2008 summer Olympics in Beijing



Food Safety Law, prohibiting the use of any unauthorized additives in food products.



forces popular U.S. hisir care company Organix to change its name to OGX.



The cold pressed juice market has an estimated value at \$100,000,000 a year due to the popularity of cleansing and detoxing with pure fruits and veggies.



5012

11/9/1/955

M'CLLN'CSS

1994



The first ever "screen free week" is championed by TV-free america.

2007



Wearable company FitBit is founded.

2008

2009



Spa vacations to locales such as Fusion Mala da Nan in Vietnam continue to grow. 2013



Kim Kardashian promotes "vampire facials," where one's own blood is used therapeutically. 2015



Vogue proclaims wellness is the new luxury status symbol.

13 years after the launch of the Human Genome Project, the first human genome is sequenced.



Gwyneth Paltrow's launch of Goop, a holistic wellness newsletter, contributes to the mainstreaming of ancient wisdom wellness practices.

goop

rhemselves as spiritual but not religious, partially attributed to the rise in practice of yoga.

A Pew Forum survey

finds more than 1 in 3

Americans describe



The Global Wellnes Institute launches and asserts that the global wellness industry market is valued at \$3.4 trillion



PepsiCo acquires kombucha company Kevita, hearkening probiotics into the mainstream.



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† O 7



CREATIVITY

199



"The Real World" debuts on MTV

1994

1995



GenderPAC, the first national political advocacy organization devoted to gender 2000



"All Your Base Are Belong To Us," one of the very first internet memes, is made into a techno dance track. 2002



Reddit is founded, popularly referred to as the "front page of the Internet." 2010



Pinterest and Instagram debut, offering new platforms to display naunces of personal identity. 2013



Beyonce releases
"Fluwless" an
unapologetic anthen
(later followed up
by "Sorry," with
repeating chorus
"I Ain't Sorry").

201



The Unapologetica Black movement rises in conjunction with Black Lives Matter.

MAC cosmetics makes drag superstar RuPaul a spokesmodel



1999

The first emoji appears on Japanese phones, quickly replacing primitive emoticons.



2003

Japanese Kawaii culture gains popularity and is imported outside of Japan.



2009

Uber causes the gig economy to boom.



2011

Snapchat is released, an ephemeral disappearing photo & video app, unleashing a new wave of consumer interest in documenting real life experiences.



Aerie Real campaign, which features unphotoshopped models.





HUMANITY



2004





Philosopher's Stone is first published. ushering in a new era of fantasy microtribes.







95















LUXURY



Linda Evangelista famously says she won't wake up for less than \$10,000 a day."

2003



Louis Vuitton launches the Multicolore monogram handbag collection, causeing a surge in popularity of monogrammed products.

2004



The Davil Wears Prada" movie is released, making high fashion more accessible - and laughable.

2009



Conspicuous consumption gets a big parody from Lonely Island's I'm on a Boat."

5



CNBC first reports CostCo as the world's largest importer of high-end French wines.

2014



Fashion becomes more democratized through the work of retailers like Target and H&M, notably with a Balmain x H&M collaboration.



Supreme x Louis Vuitton becomes available for preorder.

Microsoft launches Windows XP, putting Bill Gates in line to become the richest man in the world and potentially the world's first trillionaire.



Paris Hilton's "The Simple Life" and Heidi Klum's "Project Runway hit their stride, both marrying rags to riches.



The Great Recession begins, causing public distrust of big corporations: Conspicuous spending falls out of favor and the definition of aspiration expands.



opens up the market for curated. customized products offered as a subscription service.

Birchbox's success



AirBnB rebrands following significant growth, bolstered mostly by Millennials who have caught the travel bug



Kylie cosmetics makes a big splash by releasing limited edition batches of products designed to sell out and create social buzz.







Challenges PAVING THE WAY FORWARD

A DISRUPTIVE BEAT PAVING THE WAY FORWARD







In every challenge, there are opportunities for disruption.
In a disrupted market, the innovative thrive.

6 MOTIVES OF THE MODERN CONSUMER

Quality





Purpose



Shareability



Self-Expression



Health & Well-being>



Betterment





THE CHANGING RHYTHM PAVING THE WAY FORWARD



GEN X

MILLENNIALS

GEN Z

BABY BOOMERS

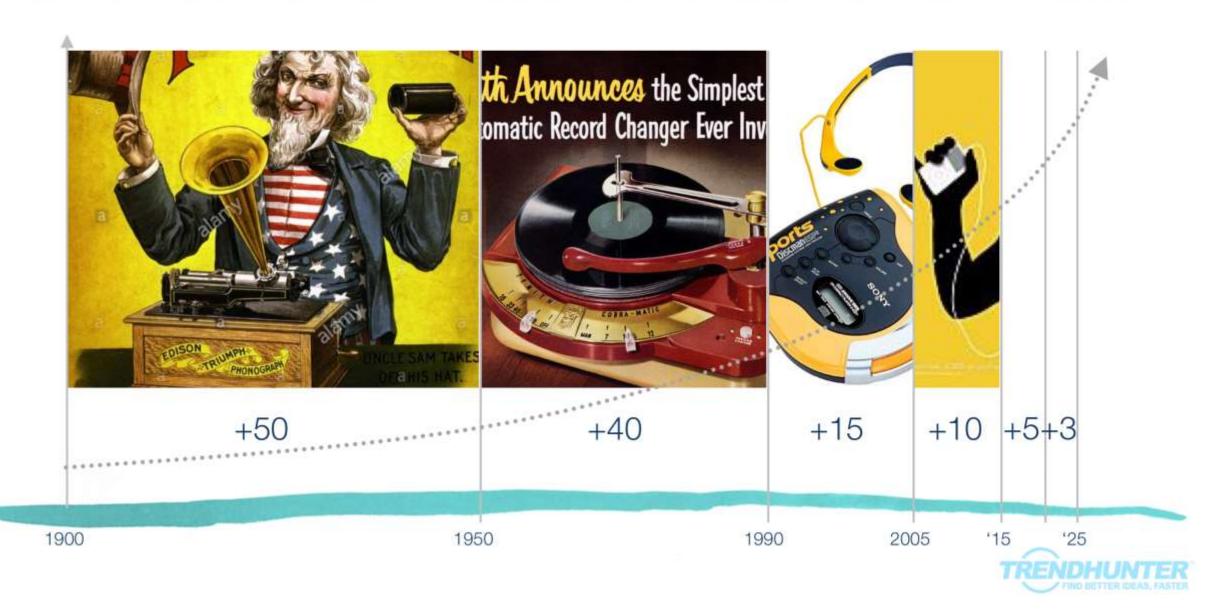
LOOKING TO THE FUTURE

How will we change to meet the changing desires of consumers?



What are the new rules of perfumery? Are there any rules?

INTERVALS OF ACCELERATING CHANGE



LEAVING YOUR SIGNATURE

How do you

theine

in this environment?

INNOVATION POTENTIAL

Intelligence Innovation **Potential Raw Creativity** Age



BE METHODICAL ABOUT CREATIVITY



- Reset your expectations
- Kill your ego
- Throw away your first ideas
- Use patterns & megatrends
- Deep dive your curiosities



BE OPEN TO POSSIBILITY

- Encourage play
- Stop knowing the answer (& ask questions)
- Assume you are incorrect
- > Break rules
- Diversify your team









HOW WILL NEW INGREDIENTS HELP YOU LEAVE YOUR SIGNATURE? MIDDLE



TAKE WHAT IS KNOWN, SHAKE IT UP, AND SEE WHAT COMES OUT!

Demonstration 1 – Reduce or replace a common but restricted material with a similar ingredient at lower levels.

A SAMPLE SIGNATURE

Formula to replace
Hydroxycitronellal with
Hydrofleur

	0	HF1	HF2
Material Name	Original %		
Chanel #5 Type	92.36	92.36	92.36
Hydroxycitronellal	7.64		
Hydrofleur		0.06	0.13
Dipropylene Glycol		7.58	7.52

Formula diluted to 10% in alcohol



Demonstration 2 -- Replace common aldehydes with newly developed high impact specialties.



	0	
Material Name	Original %	
Chanel #5 Type	99.618	99.618
Decyl Aldehyde	0.127	0.000
Undecylenic Aldehyde	0.255	0.000
Tanzinal	0.000	0.0038

Formula diluted to 10% in alcohol

ADVOCACY

What are we doing to advocate for our industry and promote the benefits of fragrances?



