

France Classic to the core

J'Adore, Chanel N°5, Coco Mademoiselle, Angel, Shalimar...the 2011 list of the top five women's fragrances in France reads like a who's who of the great classic perfumes. IFF's Catherine Bru, director FDG, fine fragrances, and Micaela Braccini, senior marketing manager, fine fragrance Europe, explain: "The top sellers in France are pretty much stable. In 2011 the dynamic of the market did not really rely on new launches, but mainly on classical brands." Nicolas Olczyk, fragrance expert of Paris-based consultancy Rouge Curacao, adds: "In the top ten for 2011, there is only one new fragrance: Lady Million (Puig, launched Autumn 2010) at number eight. All of the other products are classics and all of them are made by French brands."

Those famous five fragrances are, of course, popular all over Europe, particularly among older women, but in France even 16-24 year old mademoiselles like a classic scent, according to Mintel (one in three compared with one in five British women in this age group.) Mathilde Puszka, beauty industry specialist at the NPD Group in France, reveals: "We can explain the



France: Top five women's fragrances, value sales, 2011

Scent	Brand
J'Adore	Christian Dior
Chanel N°5	Chanel
Angel	Thierry Mugler
Coco Mademoiselle	Chanel
Shalimar	Guerlain

Source: Courtesy of IFF

France: Women's fragrance market value, 2008-14

	€m	%+/-
2008	1,396	-3.7
2009	1,388	-0.6
2010	1,395	0.5
2011 (estimated)	1,420	1.8
2012 (forecast)	1,445	1.8
2013 (forecast)	1,479	2.4
2014 (forecast)	1,520	2.8

Source: Mintel

success of classic lines in fragrances by the fact that the main brands really bet on these lines and invest more in them, in media (with new communications, new model/actress endorsement) or with product extensions (new EDT, new sizes, gift sets)." For example, in March 2011, Chanel created a buzz over Coco Mademoiselle with the new advertisement starring Keira Knightley. Changing the celebrity spokesperson for a brand can also create fresh interest – Eva Mendes replaced Naomi Watts for Thierry Mugler's Angel (Clarins) and Penelope Cruz succeeded Kate Winslet as the face for Lancôme's Trésor (L'Oréal). Another way for a classic brand to gain market share, explains Olczyk, is by "creating an interesting variation of an ancient fragrance. For instance, Guerlain's Shalimar Parfum Initial (LVMH) offers a softer and slightly more powdery version of Shalimar. With this, the brand has also proposed a younger image of the classic fragrance. If women don't want to buy the new Shalimar, maybe they will be interested in discovering or rediscovering the classic one."

This has become a popular move by prestige fragrance houses in recent years, explain Bru and Braccini: "Companies have focused or refocused

Chanel N°19 Poudré harks back to the original edition, by launching on Chanel's birthday

France: Women's fragrances, breakdown by format, 2012*

	€m	%+/-	Units m	%+/-
Total eaux de toilette & parfum	114.44	1.5	12.86	3.0
Women's eaux de toilette & parfum	51.14	3.7	6.16	5.4
Total coffrets	61.15	9.5	5.34	10.6
Women's coffrets	21.26	9.5	1.93	27.2
Total eaux de cologne	33.18	-0.2	9.38	-0.1

*Sales through super/hypermarkets, year to 27 February 2012

Source: SymphonyIRI France

Prada's Candy, fronted by actress Léa Seydoux, was received very well by French consumers

A fragrance first for Miss Dior

When Miss Dior Cherie launched in 2005 as a flanker to Miss Dior, it quickly achieved something that the vast majority of launches do not – it achieved classic status. And at the end of 2011, it surpassed this with a highly unusual achievement. Dior renamed the incredibly successful Miss Dior Cherie as Miss Dior, making it the first time in fragrance history that a flanker has stolen the name of the original. Meanwhile Dior has changed the name of the historic Miss Dior fragrance, which originally launched in 1947, to Miss Dior Originale.

their development on their brand DNA – their core values. They have been capitalising on their master brands by animating them with several olfactive twists and flankers.” Another example is Chanel N°19 Poudré, which alludes the new edition to the original by matching the launch date, 19 August 2011, to the birth anniversary of Gabrielle Chanel. It features iris as its central ingredient, inspired by the use of ground iris rhizomes, which were long used to powder the hair and face.

A blooming year

Whether they are choosing classic or new fragrances or both, French women are gradually returning to their pre-recession spending habits. Michelle Strutton, senior beauty analyst at Mintel, comments: “While pricing now plays a greater role behind French women’s purchasing decisions, they will not compromise on quality. They still look for creativity and differentiation in their products and at the point of sale, and are attracted to high perceived value.” And while the prestige end of the market – the most important channel with premium products accounting for 84% of total value sales – bore the brunt of the recession, it is now performing rather well again. According to NPD, the selective market for feminine fragrance grew by 3.5% in 2011. Volume growth however, was just 0.4%, which leads Olczyk to say: “If we had growth in 2011, it’s only because brands increased their prices.” Looking at the mass market in 2011, sales of women’s eaux de toilette and parfum through supermarkets and hypermarkets grew by 3.7% to €51.1m, while sales of women’s coffrets climbed an exponential 27.5% to €21.3m. Overall the women’s fragrance market was worth approximately €1.4bn in France last year, according to Mintel, seeing it retain its title as the most valuable fragrance market in the Big 5.

Modern gourmands

Classic fragrances may be the beating heart of the French fragrance market but certain new launches over the past year have been very well received. L’Oréal in particular is feeling pretty happy right now about two of its 2011 launches. Olczyk says: “Loverdose by Diesel and Trésor Midnight Rose by Lancôme are the most successful new feminine launches of 2011. If the first one is more oriental,

Oriental Woody, and the second more floral, Floral Fruity, both of them are gourmand.” And this is where their success probably lies, at least in France, continues Olczyk, who says: “If you analyse the French market, you see that several gourmand fragrances perform well: Angel (Clarins), Lolita Lempicka (AmorePacific Group), and also Cacharel’s Amor Amor (L’Oréal), Dior’s Hypnotic Poison (LVMH) and Nina Ricci’s Nina (Puig). These are the kinds of scent that French women like.”

Trésor Midnight Rose offers a more modern interpretation of the original scent, which was created 20 years ago, with its blackcurrant and raspberry tones giving it a gourmand twist. Lancôme intensified support for this launch too by producing its first film for a fragrance, starring actress Emma Watson. The success of the fragrance and its advertising support has resulted in an effective revamp of the Trésor franchise.

For Loverdose, the gourmand emphasis is expressed through its base notes of vanilla and creamy liquorice liqueur, which are combined with amber and woody notes. The floral-spicy composition opens with star anise and mandarin, while the core of the composition is formed by sambac jasmine, liquorice and gardenia petals. Consumers are also no doubt attracted to Diesel’s marketing tactics for this scent, claiming it to “possess molecules that stimulate the hypothalamus, the part of the brain responsible for attraction and lust”.

Daring darlings

A modern gourmand scent also popped up from Prada (Puig) with Candy. This woody gourmand oriental features a caramel accord and an overdose of benzoin at a concentration of 12%, providing warm and sweet notes that are said to evoke vanilla-scented honey. The bottle is bold and colourful, yet also sophisticated, while the advertising features Léa Seydoux, the rising darling of French cinema. With Candy, Prada set out to create a new, unexpected and optimistic concept, and it succeeded, simultaneously managing to push the Prada fragrance brand to a whole new level. Olivier Aron, founder and ceo of ROSAE, a Paris-based research and analysis company for the perfume, beauty and spa market, comments: “Prada as a brand is notorious in France, and Candy was an important launch because it refocuses the brand on its commercial values. The previous launches from Prada have been very qualitative but not in the mainstream olfactive segments – while Candy is.”

Guerlain has also crossed into new territory with La Petite Robe Noire. Aron says: “With this fragrance Guerlain dared to do something new. They have moved more into the fashion arena instead of appealing to the heritage of Guerlain as they usually do.” Developed by in-house perfumer Thierry Wasser, the fruity floral incorporates patchouli, almond, red fruits, bergamot, rose, liquorice, smoked black tea, tonka bean, vanilla and iris.

Givenchy (LVMH) also found success with a new launch when it introduced Dahlia Noir, the



first fragrance developed under the creative direction of Riccardo Tisci. The woody oriental scent blends floral and powdery facets, with notes of pink pepper, mandarin, mimosa, rose, iris, patchouli, sandalwood, vanilla and tonka bean. Olczyk says: "Dahlia Noir was the third best selling feminine launch in 2011 in value terms. The scent is original also – fluffy, faceted, seducing, but not too polarising."

Floral favourites

There is also a new development in terms of olfactory trends in France, according to Aron, and this is likely to be explored further in the 2012 launches that are yet to hit the shelves. "We are now seeing a renewal of the big floral segment and we expect to see some big things happening this year, certainly in terms of white florals," he says. Cartier recently explored this with Baiser Volé, an intensely floral concept based on a single flower – the lily. Described as fresh and powdery, the scent, which is housed in an elegant glass bottle with a golden stopper, opens with the pistils of the lily, the heart is based on lily petals, while the base notes offer green leaves of lily. Elsewhere Acqua di Parma (LVMH) has followed Iris Nobile and Magnolia Nobile with Gelsomino Nobile, the latest fragrance in the Le Nobili collection, a floral green-musk scent based on an exclusive species of jasmine grown in the Calabria region of Italy.

Powder power

Another interesting trend is nude/powdery fragrances, notes Olczyk. "Generally these scents are floral and also sophisticated," he says. Many new launches have tapped into this fragrant colour trend over the past year. Nina Ricci's L'Air (Puig) is an airy and floral edition composed of honeysuckle, jasmine, magnolia, violet extract and powdery notes, while Burberry Body (Burberry) opens with fresh green absinthe, peach and freesia, leading to a heart of roses and iris and a base of sandalwood, cashmeran, musk, amber and vanilla.

Valentina by Valentino, the brand's first fragrance under its new licensing arrangement with Puig, also nods to this trend. Advertised as a floral, it features notes of bergamot, white truffle, white flowers, strawberry, jasmine, orange blossom, tuberose cedar, amber and vanilla – a



Craig McDeam/Olivier Trillon © Cartier 2011

delicate scent with a powdery drydown. Meanwhile Elie Saab's debut fragrance Le Parfum (BPI), designed by perfumer Francis Kurkdjian, focuses more heavily on orange blossom and jasmine with a warm patchouli and honey base, but also fits with this trend.

Baiser Volé by Cartier focuses solely on the floral concept of the lily

Twice as niche

The return of the floral segment also seems to have piqued the interest of niche brands. The French press is all over Series 3 No.2 – Trompe L'Oeil by Six Scents, a compilation of neroli, mimosa, rose and tuberose on a warm vanilla base and Clemency by Humiecki & Graef, a fragrance "inspired by the pride of a mother", featuring rose, linden blossom, cassis, milk, sandalwood and leather.

Meanwhile the king of niche brands, Serge Lutens has also turned to florals for his latest creation, Vitriol d'Oeillet, which translates as 'angry carnation'. It features spicy notes, including cayenne, black pepper, pink pepper, nutmeg and clove, and is described as slightly powdery. According to Aron, Serge Lutens is much more than a niche brand – it is available within classic distribution yet successfully adopts the niche attitude and has carefully built up a cult reputation with the help of Shiseido's support over the past

The parfum launch pad

ECM looks into the rate of NPD for women's fragrance in France, and what it means for consumers and the industry

Despite what appears to be a global decline in the number of new fragrance launches each year – Michael Edwards listed about 700 for women in 2011 – France continues to churn out new scents at an astonishing rate. According to NPD, more than 230 women's fragrances launched in France in 2011, an increase on 2010. Nicolas Olczyk, of Paris-based fragrance consultancy Rouge Curacao, comments: "The number of fragrance launches is really impressive. For a customer there

are too many new perfumes to discover. But at the same time, many of them are flankers and limited editions. These elements make women ask questions like are these launches really new? Are they interesting? Are they worth their price?" He adds: "Sometimes women don't know whether the fragrance that is being launched is the same as the existing one. Has the bottle, or the name, or the scent changed? When a customer is unsure or disappointed, they think instead of buying. With only a few launches becoming successful in terms of results, I think the main challenge for fragrance brands is to launch fewer new products, but to make them stronger."

The smells of 2012

IFF's Catherine Bru and Micheala Braccacini share their opinions on the key olfactory trends for 2012

- The retro-vintage trend with classical themes will be reinvented with new chypre, new green notes, new spicy compositions and new woody notes for women.
- Florals will continue to return, with white flowers more specifically.
- There will be more audacious associations with new gourmands and new animalic notes.

ten years. Aron says: "The real olfactory creation comes from Lutens and makes no compromise on its creations. Yet the brand finds its customers in Sephora, Les Galeries Lafayette, Bon Marché and so on. Serge Lutens is the reinvention of the selective brand."

Key players

Fragrance brands of all shapes and sizes continue to keep the market moving. But when it comes to retail, the situation could not be more different. "There are no major initiatives from retailers," says Aron. "When we do see some new concepts, they are only in Paris. Le Printemps has concentrated quite a lot on niche fragrances, but this is a very small part of it. Years ago, grands magasins used to take 10% of the market but today this is dramatically reduced. Today the key

players are Sephora and Marionnaud." La Belle Parfumerie, a 2000sqm space dedicated to beauty and ultra-luxe fragrance that launched within Le Printemps Paris in October, may be just one sniff of what could be the future for fragrance retailing, and it is certainly one of the most forward-thinking concepts around. It claims to be a reaction against the self-service trend, which dominates fragrance retailing in France, offering instead a five star service to customers and aiming to be faithful to the spirit of each brand it stocks – from Guerlain to Juliette has a Gun. Elsewhere, niche perfumery Parfums Jovoy opened its doors early last year, stocking a host of rare and unusual fragrances, all housed in glass cubes.

Fragrance forecast

Compared to 2010, last year was a quieter year for major launches from the key players. Aron says: "On the whole 2011 was a year of consolidation and good flankers. The key fragrance companies have decided to postpone the big launches and make them better and more interesting to consumers. The market has been remarkably stable and this is because of the improved quality of the major launches."

And there are some exciting signs ahead. Aron adds: "I am expecting 2012 to be more dramatic in terms of women's fragrance launches. Some big things will come along between May and September." Perhaps 2012 will be the year the market comes up smelling of roses.

Germany Olfactive optimism

The German women's fragrance market has continued a good run of form in the past 12 months with both volume and value sales seeing an upward turn, according to the latest figures from SymphonyIRI Germany.

In terms of value sales, the women's fragrance market grew by 5.7% in the past year, to reach €1.15bn, while volume sales also increased by exactly the same percentage to 52.03m units. These were both positive results and showed that German consumers were still happy to spend their Euros on olfactive wares.

Looking at the breakdown in more detail, it can be seen that when it comes to value sales, all areas apart from fragranced body care products made gains – fragrances themselves grew by 6% to €876.5m and fragrance coffrets rose by an even more impressive 9.1% to €165.5m. However,

Germany: Women's fragrance market value, €bn

	Value	%+/-
2010	1.09	-1.3
2011	1.15	5.7

Source: SymphonyIRI Germany

Germany: Women's fragrances value breakdown, 2011, €m

	Value	%+/-
Total	1.15(bn)	5.7
Fragrances	876.5	6.0
Fragranced body care	114.5	-0.5
Fragrance coffrets	165.5	9.1

Source: SymphonyIRI Germany

fragranced body care products did slip by 0.5% to €114.5m. When it came to the volume breakdown all sectors saw gains – fragrances grew by 3.5% to 33.6m units, fragranced body care products grew by a robust 10.6% to 11.1m units and fragrance coffrets put on 8.9% to total 7.2m units.

Domestic debuts

Obviously the German women's fragrance market follows hot on the heels of the rest of Europe when it comes to new launches and relies heavily on international brands to make up the bulk of sales. But that is not to ignore the contribution made by domestic fragrance houses such as Mäurer & Wirtz