

**WE
CAPTURE
WHAT
MOVES**



FRAGRANCE MARKET TRENDS

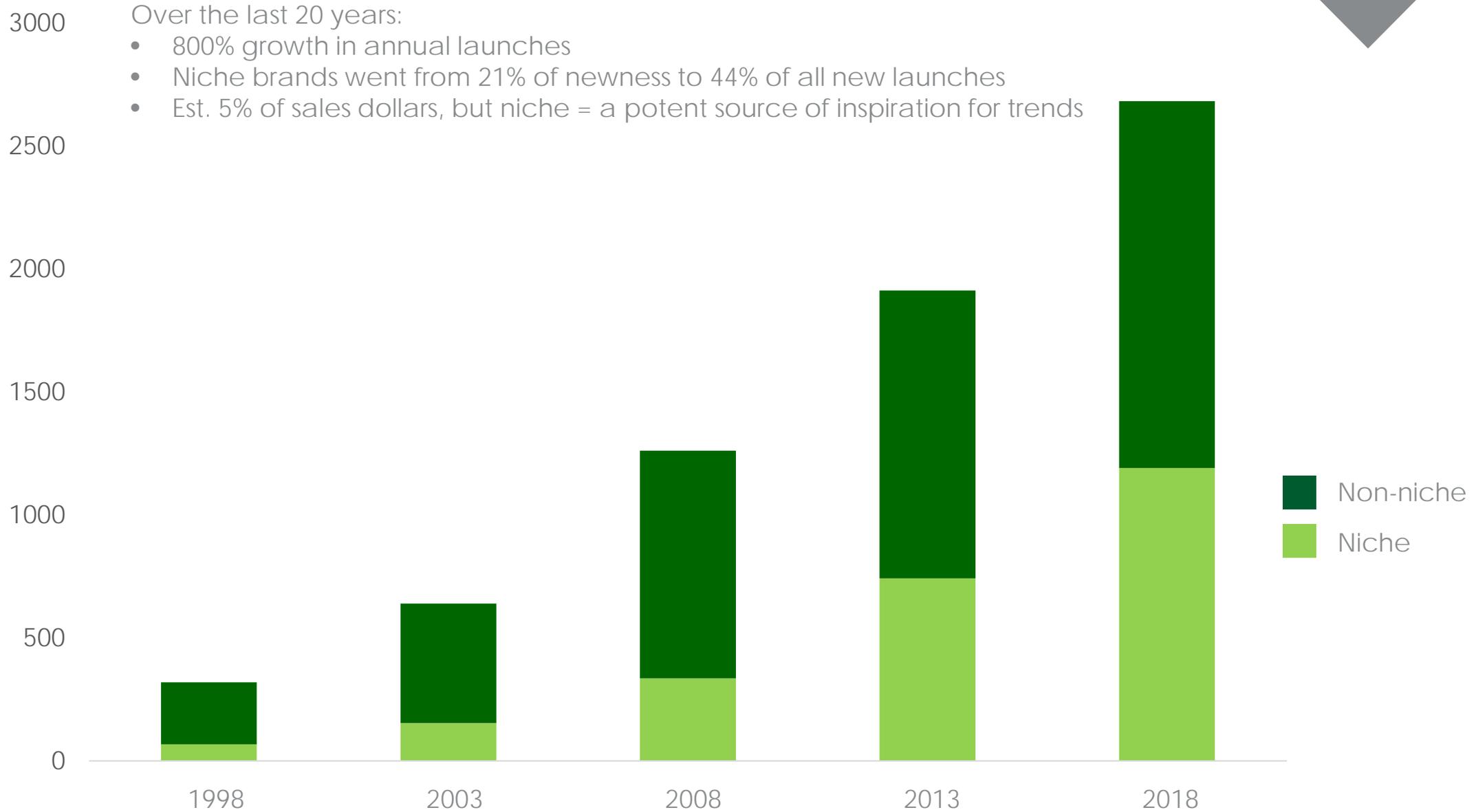
PREPARED FOR SWSCC

CONFIDENTIAL

August 2019



GLOBAL NEW FRAGRANCE LAUNCHES OVER TIME



Source: fragrancesoftheworld.info

FRAGRANCE MARKET TRENDS

SWSCC August 2019

WHY NICHE NOW

The will, the way, the underserved market

Maker Movement

Maker Movement Manifesto
Crafters, hackers, tinkerers
Microbrews
Artisan coffee
Metalworking, woodworking
Lifestyle & educational philosophy:
learn by doing



Bye Bye Barriers to Entry

Access to information
Access to raw materials
Retail not necessary



Shifting Consumer Habits

Big Beauty not cool
Retail not cool
DTC fragrance exploring
communication & sampling
challenges



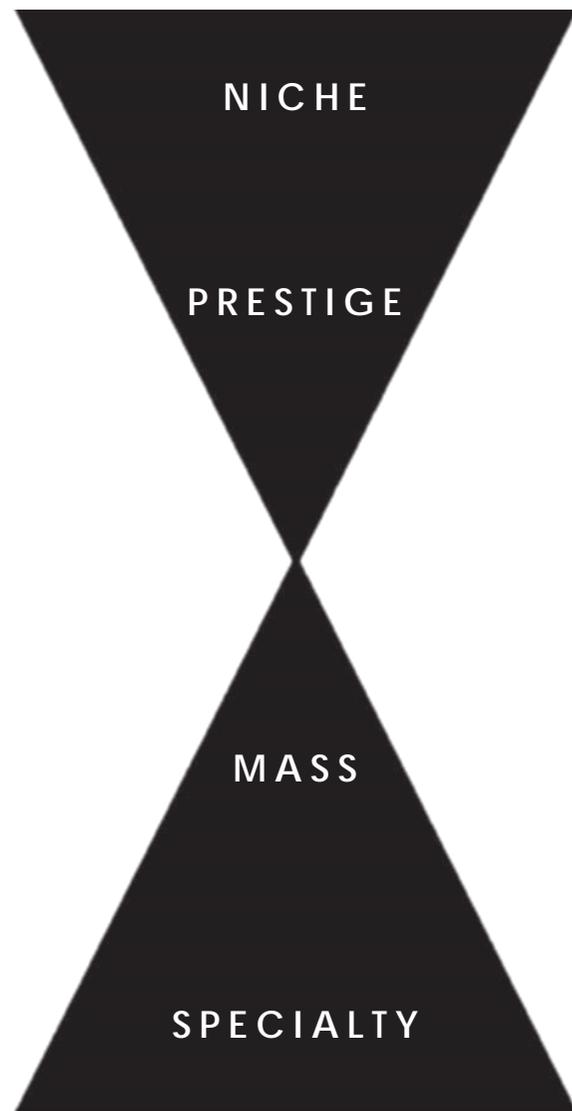
CULTURE CONTINUUM



CULTURE CONTINUUM



THE HOURGLASS EFFECT



Quality & overdose of ingredients
Immersive experience
Highly selective retail & digital distribution
Driving trends



Perceived quality relative to selling price
Faceted, rounded, commercial fragrances
Strong communication campaign
Inconsistent retail experience



Copycat & me-too fragrances
No distribution control
Uninspiring retail experience



Overdose of ingredients
Immersive retail experience
Tons of seasonality
Low digital presence
Driving trends

HOW DO WE INSPIRE PERFUMERS?



<https://jauntful.com/mmg212/rB-38SZ5L>

PERFUMER GINO PERCONTINO ON CANNABIS



It has like this mango, tropical fruit, juniper. . .

(yeah but it has texture that's different, like a fleshy texture)

It's rhubarb-y, and you get that grapefruit, even, feeling. . .that. . .kind of bitterness.

Oh, I love that one!



Let's smell!

Synthetic aromachemical

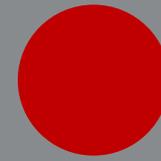
Proprietary to MANE

Citrusy, rhubarb, bitter

Starting point for "growing cannabis in a perfume bottle"



TIMUR PEPPER PURE JUNGLE ESSENCE™



Let's smell!

Discovered by accident

Natural extraction

Proprietary technology

Sustainable

Delivers maximum benefit at the origin of the value chain

A different starting point for "growing cannabis in a perfume bottle"



<https://www.youtube.com/watch?v=wZsq4pN1b9k>

CANNABIS IN RECENT NICHE LAUNCHES

Cannabis effects (whether called out or not) take a hit with peppery, citrusy, fruity, green, rhubarb, vetiver facets.



Dandelion Fig
Shay & Blue



Freeway
4160 Tuesdays



Pélargonium
Aedes de Venustas



Kings Wood
Shay & Blue



Hemingway
Masque Milano



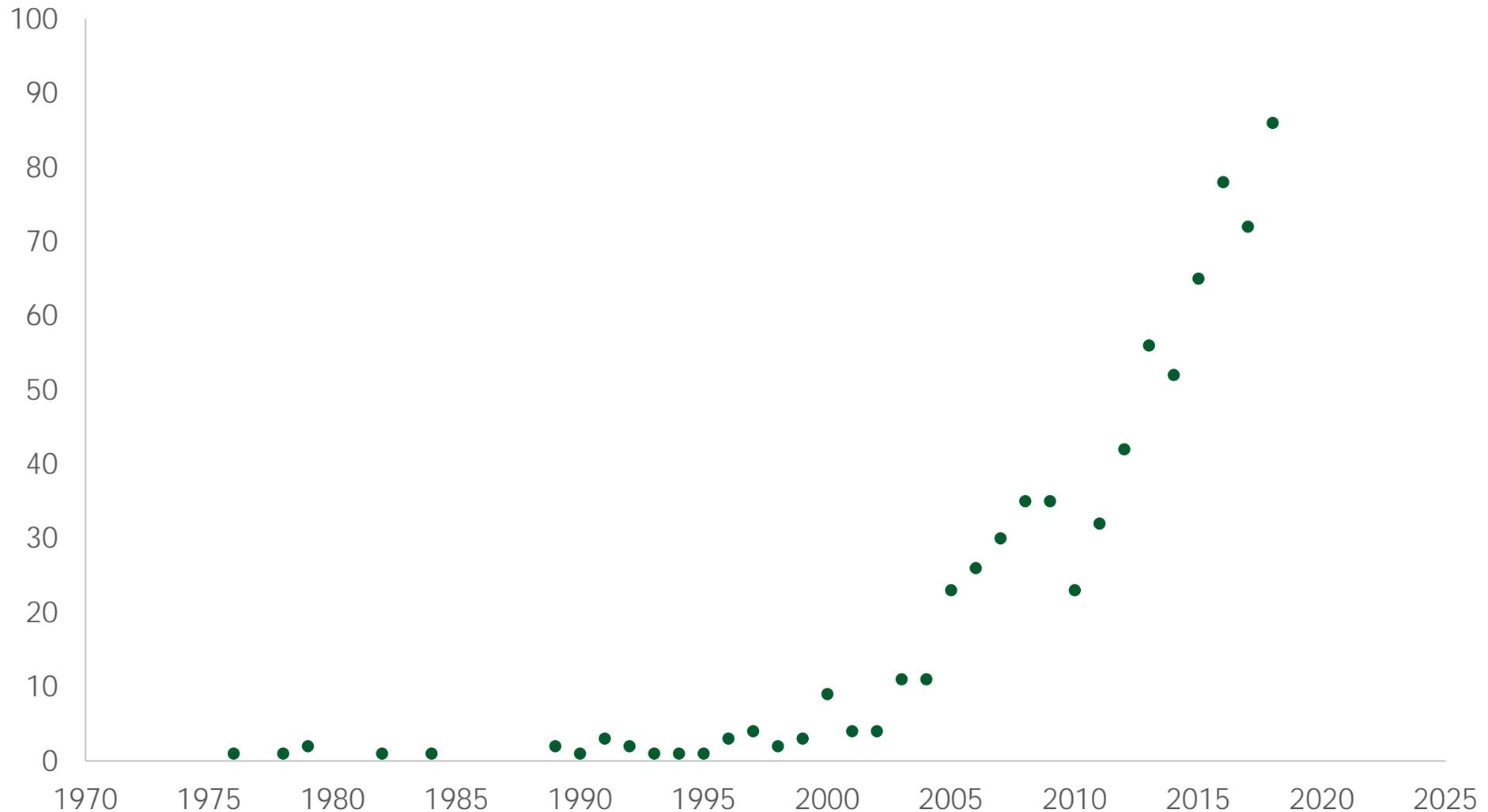
Gamine



Green Bubble
Jusbox

COCONUT BECOMING THE NEW VANILLA (US)

In the US last year, 8% of all new launches called out coconut (vs 24% called out vanilla).



COCONUT: NO LONGER JUST FOR SUMMER



COCONUT PUMPKIN LATTE

BBW Hand Soap

A freshly brewed cup of **coconut cream**, whipped pumpkin & warm praline.

Fall launch



WHITE COCONUT CARAMEL

BBW Hand Soap

A creamy, nutty treat of **coconut flakes**, toasted hazelnut & caramel swirl.

Fall launch



COCONUT MACAROON

BBW Home Candle

Toasted coconut, fresh baked cookie, vanilla bean, touch of spice with essential oils

Fall launch



BRONZED COCONUT

VS PINK

fruity gourmand with **fresh coconut**, warm with toasted coconut, juicy mango & tiare petals

End of Summer/pre-Fall launch



PINK SPIRIT

VS PINK

fruity gourmand with **fresh coconut**, creamy praline & wild berries

Fall launch



COCONUT FROSTED SNOWBALL

Bath & Body Works

A wintry mix of **frosted coconut**, North Pole vanilla & winter freesia.

Winter launch

COCONUT ISN'T JUST FOR SPECIALTY



Love the Way You Feel
Kilian

Luxury \$200+



Pacific Lime
Atelier Cologne

Genderless - mainstream



First Instinct Extreme
Abercrombie & Fitch

Masculine



Rising Sun
Shiseido

For the Asian market

CANNABIS COCONUT ACCORD



Let's smell!

Accord = an olfactive idea, a piece of a fragrance

Contains both Betahydrane™ and Timur Pepper Pure Jungle Essence™

Creamy, warm, sensual, totally commercial

Reflects wellness trend: CBD + MCT



CANNABIS CALLOUTS IN MAINSTREAM PRESTIGE



212 VIP MEN PARTY FEVER

A liberating herbal cocktail

This fresh summer scent opens with a spicy energy, then mellows with a herbaceous **cannabis accord** in the heart, giving the fragrance an edge of risk. The base features the seductively masculine combination of cedarwood and musk.



MALIN & GOETZ CANNABIS EDP

No lingering side effects

Once defiantly naughty, now inescapably chic, and always a rite of passage, **cannabis** has never been more à la mode. Because cannabis is a natural medicinal herb, we consider it a perfect "modern apothecary" ingredient. Our **cannabis edp** fragrance balances spicy herbs with white floral notes and a hint of lingering smokiness. One whiff and you'll know the feeling. Lazy afternoons. Fading innocence. Endless possibilities.



REPLICA MUSIC FESTIVAL

A hypnotic daydream of Woodstock on a sun-drenched summer day, exuding rich and heady notes of **cannabis**, incense oil and leather accord. Lying amongst an endless verdant landscape of greens and fresh buds, you feel the brightness of sunshine and a red apple accord overcome your senses. Vibrations of sound and throbbing melodies push you deeper into a trance of peace as a spirituous rush of tobacco and incense accord heightens your senses and free your mind. Day breaks into night, but the trail of earthy cedarwood and leather scents flow through the evening summer breeze, eternalizing your state of nirvana.



CLEAN RESERVE HEMP & GINGER

A playful and lively scent, **Hemp & Ginger** will delight both the extrovert and artistic Clean lover.

CREATIVE BEAUTIFUL DIFFERENT



Let's smell!

Finished fragrance, contains both
Betahydrene™ and Timur Pepper Pure
Jungle Essence™

Cannabis = the new fresh

Topnote

Citrusy, green, aromatic, herbaceous

Understated nod to wellness

Genderless

Timely & on-trend



**WE
CAPTURE
WHAT
MOVES**



THANK YOU

ADDITIONAL TRENDS

NO-MAKEUP MAKEUP → NO-FRAGRANCE FRAGRANCE

“The Softies”

- Barely detectable
- Amplify—not overwhelm—your own scent
- Effortless
- Melt into skin
- Evaporate in intimate puffs
- “A deceptively expensive white t-shirt”
- Notice you, not your perfume
- Intimate, personal
- Pashmina, goose feathers, pink translucent creamy skin



“You. . . only better.”

BEAUTY FIRST



Bath & Body Care

Hair Care



Color Cosmetics

SCENTING COLOR



L'Or has a distinctive and delicate floral scent. The first peach note blended with an accord of vegetal notes is fresh and sparkling. The rose, raspberry and jasmine heart is enriched with a powdery base of balsamic, benzoin and white musk.

SEASIDE RENDEZVOUS

Olfactively, these are all over the map



Song of the Siren No 49
Tokyo Milk



Au Bord de la Mer
L'Artisan Parfumeur



Coastal Cypress & Sea Fennel
Molton Brown



High Tide
Burberry Bespoke



Sir Gallahad
Isabey



Walk the Sea
Kerosene



Tears of Men Who Have Wronged Me
Bullicorn Rainbow



Pacific Rock Moss
Goldfield & Banks

INTO THE LIGHT: 2018



Shalimar Souffle de Lumière
Guerlain
2018



Ombre et Lumière
Armani Privé
2018



Peau de Lumière Magique
Starck
2018



Lumière du Désert
Choix
2018



Lumière
Lalique
2017



FlowerbyKenzo Eau de Lumière
Kenzo
2017



Le Cri de la Lumière
Parfum d'Empire
2017



L'Air du Temps L'Aurore
Cacharel
2017



Neroli Lumière
Bastide
2017



J'Adore Eau Lumière
2016



Lumière Dorée
Miller Harris
2016



Terre de Lumière
L'Occitane
2016

HERE COMES THE SUN: 2019



Gratitude
Luxor Fragrances
2019



Sundazed
Byredo
2019



Solar Bloom
CLEAN Reserve
2019



Sun Song
Louis Vuitton
2019



Sunflowers Sunlit Showers
Elizabeth Arden
2019



Flowerful Decadent Mimosa
Yardley
2019



Nivea Sun
Nivea
2019



Rising Sun
Shiseido
2019



Light di Gioia
Giorgio Armani
2019



L'Air du Ciel
Nina Ricci
2019



AT THE BALLET

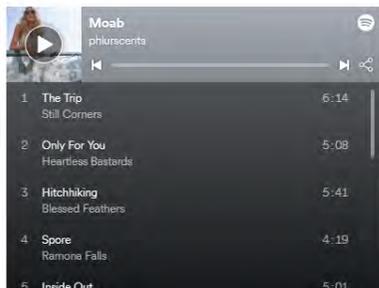


VIBE THING

MOAB: THE SOUNDTRACK

Listen Up

Want a better idea of what Moab is all about? Check out the Spotify playlist. We're detecting strong notes of Heartless Bastards, Coalexico and Spoon.



PHLUR's playlists



DS & Durga's Collaboration with Duran Duran



Listen to your fragrance Room 1015



Playlists & music concepts
Lola James Harper



JUSBOX is the symbiosis of
fragrance & music

FINDING NEW PROBLEMS TO SOLVE



Smokers' Perfume
Goest

Smokers' Perfume is especially made for those who carry the scent of cigarette smoke on their clothes, hair, and skin. This perfume and the smell of cigarette smoke are two halves of one complete unisex scent. Each "hard pack" box of Smokers' Perfume contains five mini spray tubes which fit individually into any standard pack of cigarettes for portability.

Before or after smoking, spray Smokers' Perfume on clothing, hair, or skin. It will combine with the smell of cigarette smoke that will adapt uniquely to you, and your brand of cigarettes.



Wide Society

Travel solutions for perfume lovers: portable, refillable, designed to comfort the symptoms of jetlag, traveler's anxiety, and disorientation.

Practical, simple and sophisticated, WIDE SOCIETY is a state of mind.

AUSTRALIA RISING

Fragrance brands emerging from untraditional parts of the world.

In addition to these brands from Australia, we are also looking to Turkey (Nishane, Pekji), and Malaysia (Auphorie, Ningen).



SOUTHERN BLOOM WOOD INFUSION DESERT ROSEWOOD PACIFIC ROCK MOSS WHITE SANDALWOOD BLUE CYPRESS

Goldfield & Banks Australia



Map of the Heart



Grandiflora



Mihan Aromatics



Fort & Manle

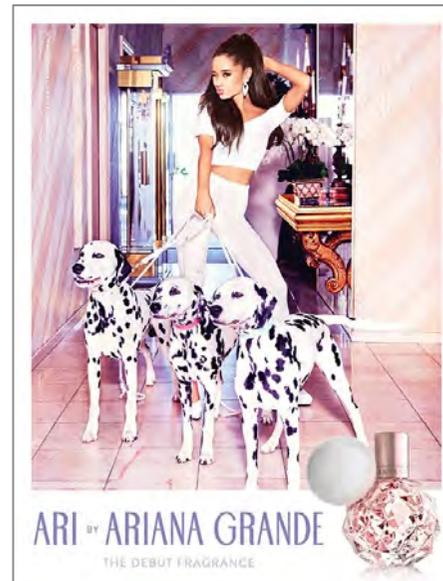
CELEBRITY UPDATE



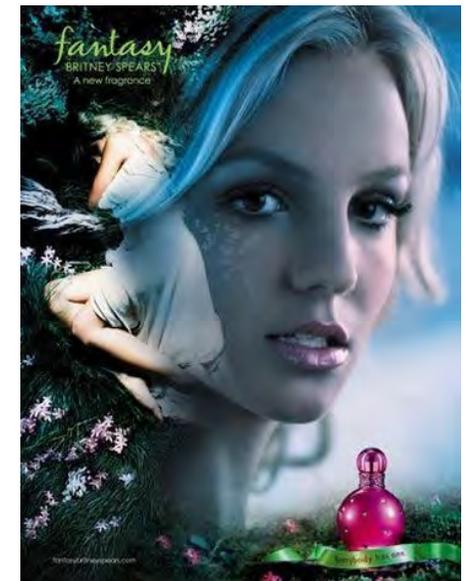
Prestige \$8.1
 Mid-Tier \$2.6
 Mass \$20.7



Prestige \$3.7
 Mid-Tier \$1.7
 Mass \$1.3

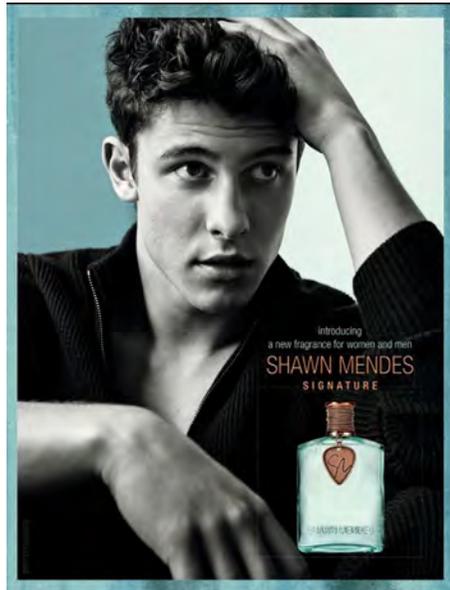


Prestige \$1.6
 Mid-Tier \$1.2
 Mass N/A



Prestige N/A
 Mid-Tier \$0.7
 Mass \$5.7

GENDER FLUIDITY



From "for both (nothing overtly fem/masc) " to "----" to "intentionally fluid"