perfumes in fabric care
Modern perfumery...

Started towards the end of the 19th century

First synthetics made their appearance (coumarin, heliotropine, vanillin, ionone, aldehydes...)

Olfactive revolution!
Aldehydes...

"Introduced a breath of freshness and energy into the world of fragrance"

Introduced to the public in 1921 when Chanel N 5 was launched
Rawmaterials...

A fragrance house have a list of substances used ~ 1500 substances

(within the fragrance industry thousands of substances are known)
...out of these substances...

~ 50 % do not contain any of the 26 fragrance allergens
~ 3% = allergens themselves
~ 25% = naturals containing one or more allergens
~ 15% = bases containing one or more allergens
~ 10% = synthetics containing an allergen as an impurity
Why these substances?

- price
- cosmetic regulation / directives
- performance
- safety
Today more synthetic substances are used compared to the past.

Only 20 years ago there were more essential oils used.
Trends fabric care
"there is a demand for increasingly sophisticated, longer lasting and highly diffusive fragrances in nearly every category from household cleaners to air care".

"...consumers want their laundry to smell fresh and clean not only when they are first taken out from the dryer, but for weeks afterwards"
Today's consumers expect **convenience** and efficiency when it comes to cleaning...
Detergents...
Concentrated products

benefits:
Convenience: packaging is smaller, easy to store and also to carry
Efficacy: more concentration, better results
Ecological: less packaging, less transport, less waste

(Still a key challenge in some countries (southern Europe) to change consumers habits (overdosing))
some manufacturers are pushing the conversion to **ultra concentrated** liquids

-> Gels

private labels are launching (or re-launching) gel formats
Unit dosing

Liquid Capsules are still growing

- Liquid capsules in Europe = still small but very dynamic format

<table>
<thead>
<tr>
<th>Country</th>
<th>Capsule Type</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td></td>
<td>16%↑</td>
</tr>
<tr>
<td>France</td>
<td></td>
<td>12%↑</td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td>2%↑</td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td>12%↑</td>
</tr>
<tr>
<td>Spain</td>
<td></td>
<td>1%</td>
</tr>
</tbody>
</table>

Carrefour
2in1 Wild Orchid
Spain (Apr-13)

Carrefour
Deep Cleanliness
France (Jan-13)

MAISON VERTE
France (Apr-13)

Source: Euromonitor International 2012, y-o-y exchange rate €
Unit dosing

-> next generation is multi chamber

● Next step = multi chamber liquid capsule?
  ○ Launched by Tide in US
  ○ Henkel 1st to launch in Europe since September 2012: from Eastern Europe to western Europe
Unit dosing

New packaging

- **Doypacks**: convey more value for money
  - AUCHAN: France (Apr-13)
  - PUNOMATIC: Spain (Mar-13)
  - Omo: France (May-Jun -13)

- **White boxes**: in line with international recommendations for children safety
  - UK: (Mar/May-13)
  - FRANCE: (Mar/May-13)
  - SPAIN: (Mar/May-13)
  - ITALY: (Jun-13)
New formats

Laundry sheet

- Innovative laundry sheet detergent first launched by Dizolve brand
  - Surfing on the ‘single-dose’ trend

- Dizolve laundry sheets
  - **Simplicity** and convenience: 1 sheet = 1 wash
  - **Biodegradable**: dissolve completely during the washing cycle

Fresh Linen or Lavender scents

- Dizolve
  - France (Dec-11)

- Same format launched in France by private label **Carrefour**

Carrefour
Freshness Detergent
CITRUS Cologne GREEN SHEET
France (Mar-13)
Longlastingness

Looking for always more...

- Detergents are following Fabric Softeners trend with long lastingness claims:

  - **New claim:** From ‘just washed freshness that last and lasts’ To ‘Scents for long’
    - OMO (UL)
      - France (Feb-13)

  - **New claim:** From ‘12 hours of freshness’ To ‘long lasting freshness’
    - SPEE (Henkel)
      - Germany (Apr-13)

  - **New claim:** ‘More intense perfume’
    - SUPER CROIX (Henkel)
      - France (Mar-13)
Longlastingness

Looking for always more...

Tried and Tested
“Freshness even after 3 weeks”

Bold 2in1 P&G (UK)
Detergent & fabric softener
Fabric softeners

- Fragrance encapsulation technology
- Concentration
- New formats
Fabric softeners

- Fragrance encapsulation technology
- Concentration
- New formats
Fragrance encapsulation technology is now a standard in the category

All global players present: P&G, UL, Colgate, Henkel

Also private labels and local brands on key markets (UK, France, Germany, Italy, Turkey and more recently Spain)

The key benefit is the noticeable improvement in long lasting fragrance during the in-wear stage, one of the key fragrance moments in laundry washing stages
Fabric softeners

- Fragrance encapsulation technology
- Concentration
- New formats
Concentration...the next format?

- **93%** of European new launches are under a concentrated format.
- Liquid standard dilutes going more concentrated.

**Soupline**, new format: from 3L to 2L. same number of washes = 27

Source: Givaudan data base
Fabric Softener new launches Europe 2012
Fabric softeners

- Fragrance encapsulation technology
- Concentration
- New formats
New formats

Innovative formats in the softener category

Liquid capsules

- Rolled-out from the detergent category

Solid format

- Scent-boosters (crystal formats)

Vernel (Henkel) ‘Cristalli’ – EUROPE

Carrefour ‘Softener Pearls’ (Jan-2013)
L'OURS ON VOUS INVITE À DÉCOUVRIR SES
CAPSULES UNIQUES AUX MULTIPLES BÉNÉFICES :

1 Capsule prédosée ultra simple d'utilisation : déposez une capsule directement dans le tambour de votre machine.

2 Stockage facilité : un pack moins encombrant qu'une bouteille.

3 Fini le surdosage : vous déposerez la juste dose d'adoucissant pour obtenir toute la douceur Cajoline et une fraîcheur inoubliable.

4 Fraîcheur longue durée : grâce à leur formule spécifique, les microcapsules enrichies en parfum se fixent dans les fibres de vos vêtements, à l'abri du rinçage, et vous offrent jusqu'à 2 semaines de fraîcheur inoubliable***.

* Parfum de synthèse - ** Dans l'armoire

Comment utiliser les capsules ?
Précautions d'utilisation
Conceptual segmentation

Core Traditional
- Clean Freshness
- Simple Scents
- Purifying

Sensorial
- Time Out & Relax
- Uplifting & Escape
- Sensual
- Premium Luxury

Care
- Sensitive & Pure
- Gentle Nature
- Soothing Comfort
- Ecological
Natural ? Bio? Eco?
Seventh generation (USA)

laundry detergent

Love your laundry

OUR NATURAL LAUNDRY DETERGENTS HANG WASH-DAY WORRIES OUT TO DRY!

Laundry detergent should make short work of even tough stains. The unique formulas in our natural laundry detergents contain plant-derived cleaning agents and triple enzymes.

DID YOU KNOW?

Seventh Generation laundry detergents are made without additives like optical brighteners, dyes or synthetic fragrances. Our laundry detergents have plant-derived cleaning agents and triple enzymes that lift dirt and grease.
Natural 4X Concentrated Liquid Laundry Detergent

Liquid laundry detergent in a lightweight recycled fiber shell! The plant-based, multiple-enzyme liquid laundry detergent in the innovative inner pouch fights even the toughest stains. The entire packaging system uses 66% less plastic than a typical 100 oz. 2X liquid laundry detergent bottle – and delivers the same number of loads!

- Non-toxic liquid laundry detergent
- No optical brighteners
- Biodegradable formula
- Hypoallergenic
- No dyes or synthetic fragrances
- Detergent designed for standard and HE machines

Geranium Blossom & Vanilla

Sepawa Nordic 2014-05-06

United States Dep of Agriculture

Not tested on animals
Ingredients:
aqua (water), sodium lauryl sulfate (plant-derived cleaning agent), laureth-6 (plant-based cleaning agent), sodium citrate (plant-derived water softener), glycerin (plant-derived enzyme stabilizer), oleic acid (plant-derived anti-foaming agent), sodium hydroxide (mineral-derived pH adjuster), boric acid (mineral-derived enzyme stabilizer), calcium chloride (mineral enzyme stabilizer), protease, amylase and mannanase (plant-derived enzyme soil removers), essential oils and botanical extracts* (prunus amygdalus dulcis (sweet almond) oil, citrus aurantium dulcis (orange) peel oil, citrus limon (lemon) peel oil, pogostemon cablin (patchouli) oil, cedrol, litsea cubeba fruit oil, cananga odorata flower (ylang ylang) oil, citrus aurantium bergamia (bergamot) fruit oil, citronellol, vanillin, coriandrum sativum (coriander) fruit oil, beta-caryophyllene, eugenia caryophyllus (clove) leaf oil, pelargonium graveolens flower (geranium) oil), methylisothiazolinone and benzisothiazolinone (synthetic preservatives).

* Citral and d-Limonene are components of these essential oils.
Method Laundry Liquid
powered by plant-based technology using 95% natural and renewable ingredients...

What’s in it?

<table>
<thead>
<tr>
<th>ingredient</th>
<th>what it is</th>
<th>Health + environmental summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>natural alcohol ethoxylates</td>
<td>surfactant (cleaning agent)</td>
<td>non-toxic in use and not irritating to skin; readily biodegradable; made from coconut + other natural oils</td>
</tr>
<tr>
<td>coco methyl ester + sulfonate</td>
<td>surfactant (cleaning agent)</td>
<td>non-toxic in use and not irritating to skin; readily biodegradable; made from coconut oil</td>
</tr>
<tr>
<td>xxxxxx</td>
<td>xxxxxx</td>
<td>xxxxxx</td>
</tr>
<tr>
<td>Fragrance oil blend</td>
<td>fragrance</td>
<td>free of phthalates and other dirty ingredients, non-toxic in use and not irritating to skin; made using partial natural essential oil content</td>
</tr>
</tbody>
</table>
Durance (France)

Environmentally-friendly Durance scented liquid detergent is produced from over 90% natural ingredients.

INCI: …..<5% PARFUM/FRAGRANCE. CITRONELLOL, GERANIOL, ALPHA-ISOMETHYLIONONE, P-TERT-BUTYL-ALPHA-METHYLHYDRCINNAMICALDEHYDE (LILIAL), COUMARIN

Contient/Contains: Coumarin. May produce an allergic reaction.
ECOVER delicate wash

using renewable, plant-based ingredients & naturally derived fragrance

INCI
Aqua
Sodium laureth sulfate
Potassium cocoate
Potassiumoleate
lauryl glucoside
Sodium chloride
Sodium octyl sulfate
Citric acid
Parfum
Limonene
2-bromo-2-nitropropane-1,3-diol

Ecover Delicate Wash
Laundry detergents
Nordic Ecolabelling

Fragrances

a) Fragrance substances encompassed by the declaration requirement in the Detergents Regulation 648/2004/EEC and its subsequent amendments must not be present in quantities > 100ppm ( >0.010%) per substance.

b) Fragrance substances can be included even when classified with H317/R43 and/or H334/R42; the amounts have to be < 0.010% (100ppm).
Allergens - what’s next?

SCCS (Scientific Committee on Consumer Safety) introduced 26 fragrance substances as allergens 1999.

The current list is proposed to expand to 90 entries (incl. the current 26) -> treated in the same way as the current 26 allergens.

This is still a proposal (published for public consultation). Final adoption expected to be completed end of the year.
Future? more product segmentation?

1983

1989

1995 - refill

2014...