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## THE GERMAN APPROACH TO PERFUMERY



Germany may not be the first place that comes to mind when you think about fragrance, but it turns out the country has a rich history, heritage brands and has contributed a fair amount of innovation to the industry. How does the German approach to fragrance differ from neighboring countries? What do we know about the consumer today? What does the retail landscape look like? How has the market changed in recent times and what could happen in the next few years?

## FRAGRANCE HERITAGE & ORIGINS

The popularity of fragrance in Germany dates back to the 18th century where there are conflicting stories as to the true origin of Eau de Cologne. It seems that in the 18th century Giovanni Maria Farina, left his native Italy for Cologne, Germany, where he created a fragrance described as the essence of 'an Italian spring morning, of mountain daffodils and orange blossoms after the rain.' **He named it Eau de Cologne as a tribute to the city which had welcomed him and had given him citizenship – not an easy task for foreigners at the time.**

The fragrance gained wide acclaim and was used by the royal courts of Europe. Meanwhile a Carthusian monk made a wedding gift to Wilhelm Mülhens of an “aqua mirabilis” which could be used on the body or consumed as a tonic. Mülhens went on to create a factory for the miracle water which he established as *Echt Kölnisch Wasser* – at N°4711 Glockengasse. There's also another story about a nephew of Farina's who got into the game, but it all shows that Germany's fragrance history dates back over three centuries – and we recognize that those original fragrances are still popular today.



*Eaux de Cologne de Jean Marie Farina*

Germany was not only a key player in the creation of fragrances and flavors, but it is also where synthetics started. Leipzig-based Schimmel & Co, founded in 1829, was an internationally leading manufacturer who is considered to be the founder of the industry. Their library contains 30,000 volumes of fragrance, flavor and botanical research. **And certainly Germany didn't have fields of**

roses or lavender like France and Italy, so chemists got creative: synthetic scents and flavors were first produced at the Haarmann & Reimer (now Symrise) factory.

Lutz Herrmann, Founder and Creative Director of Berlin-based J.F. Schwarzlose told me an amazing story: *“Synthetics actually started in Germany before the French got into it. There was a guy who filed a copyright in German courts. In 1858 Albert Baur developed the musk molecules by accident when he was trying to develop a new gun powder. He was living near or in Leipzig. His experiments led to this synthetic scent of musk. He registered this formula and then other countries tried to copy him. I think this was the first copyright filed ever in modern history and it’s called the Musk Process.”*

Truly fascinating as this contribution to the development of synthetics changed the way fragrances were created.



*Symrise Perfumers Organ*



*Lutz Herrmann*

## GERMAN FRAGRANCES

Clearly the fragrance roots lay with fresh scents. Vera Talarek, Brand and Communications consultant and co-host of the Osmoscope podcast, told me **“4711 and Farina Eau de Cologne were essentially functional fragrances. They were used to invigorate, calm and soothe - externally.** Another version is Klosterfrau Melissengeist, a lemon balm based concoction that is taken in orally.” But there is more to the story than colognes.



J.F. Schwarzlose, founded over 150 years ago, was recently rediscovered and brought back to life by a small team of passionate individuals. I asked Lutz Herrmann to tell me how he found it. “I wondered why there were only brands from France, Italy or the UK that could make it. There must have been a similar important history of German fragrance houses. **There are collectors of perfume bottles, so I looked at German collectors who had German brands to see what they had and the name Schwarzlose kept popping up.** So this was the starting point of the research and ended in finding the history of Schwarzlose. Bit by bit I got to understand more about the company, the fragrances, the history behind the fragrances. They had a factory in Budapest, another close to Prague (they used Czech glass), they probably had a factory in Croatia, they had a subsidiary in Singapore, distribution in Australia, Spain, Santo Domingo and Cuba – all before WWI. Quite an advanced company. The factory dated back to the 1800’s and when the wall came down, Berlin was an isolated area. The city of Berlin decided the central area of the city should no longer be industrial. And that is when the owner decided not to relocate the factory and just closed down. It’s a rich but forgotten story in the International fragrance industry.”



Vera Talarek



J.F. Schwarzlose Rosoli flacons  
(circa 1898)

Today the brand is having a renaissance taking inspiration from the past while bringing a contemporary spirit to the portfolio. Frau Tonis follows this same philosophy, wanting to bring back the glorious past from the last century when Berlin was a city of fragrance. Other niche German brands are relatively new on the market. **This modern crop of brands typifies the direction seen across the board in German fragrance today: audacity, experimentation, creativity, singularity, originality.** Lengling Munich\*, created in 2014, bills itself as the first perfume house in Munich. 2014 also marks the debut of Urban Scents, founded by fragrance industry veterans Marie Urban Le Febvre and Alexander Urban. This husband and wife team go beyond product creation to

also offer smell training assistance. Berlin-based AER perfumes is a modern, natural perfume house at which each scent, inspired by a single raw ingredient, is hand blended in their Atelier. Escentric Molecules – probably the best known of the group – founded by perfumer Geza Schoen, focuses on aroma molecules that have the capacity to stand-alone.

## GERMAN APPROACH & CULTURE

As I continued my research, I started to wonder about the German approach to fragrance and if it differed from other its neighbors. Veronique Nyberg, Vice President Perfumer and Creation of Fine Fragrance at MANE, gave me a very logical answer: “Of course, it does. Each country has their olfactive preferences which differs from one another. It’s important for us to understand the culture where the fragrance will be launched. It’s so key and important for the description, how you talk about the perfume, which element you will highlight. **It’s a one world culture but there are differences from one country to another.** It is very challenging for a perfumer to find a common element.” Nyberg also happens to be the nose behind the contemporary J.F. Schwarzlose range and has worked closely with Lutz Herrmann. He shared an anecdotes from his own research. “I learned from Jutta Köthner the daughter of the last Schwarzlose owner, that **German and French perfumery were significantly different since legal restrictions in the past did prescribe the usage of different alcohols: in France you were to use alcohol distilled from rice in Germany distilled from grain.** The alcohol does influence the sillage so the French perfumery appeared overall more soft in the past.” So not only did certain smells have greater appeal, but scientifically, certain key ingredients were limited.



*Veronique Nyberg*



### *In the Lab*

Thinking about the cultural aspect, I turned back to Ms Talarek who remarked “Germany does not have a very elaborate fragrance culture. The overall use level of fragrances is still below that of their European neighbors. This is not to say that Germans do not enjoy scent, but I’d say they don’t have a heritage or culture of wearing fragrance as such. Yet, German society is becoming more and more diverse and so is its culture. **It is very cliché to say that the French rather wear fragrance to seduce, while Germans love to smell clean and comfort themselves with the scent they wear.**” Ms Nyberg echoed this sentiment. “The tradition has to do with freshness – if you do something sweet and powdery without freshness it won’t work. It’s something linked to how they groom themselves.”

## GERMAN CONSUMER

With this knowledge in mind, I got curious about today's German consumer. Do they appreciate niche fragrance houses from France and Italy or do they prefer domestic brands? Tamas Tagscherer, Founder, MESONSOL, observed, "Germany has surprised me. Germans like to try niche brands and are curious about new smells." According to Rene Dominik, Managing Partner at J.F. Schwarzlose, "The consumer is very interested in international brands. Most of the niche or luxury perfume brands selling in Germany are actually from Italy, France, UK and US." Ms Talarek elaborated on the question. **"I'd say that German consumers tend a little to be drawn to houses that have an air of modernity rather than heritage, or a more playful approaches."**

**This applies to both aesthetics of the juice and of the bottle and brand.** That's perhaps why Escentric Molecules were and are a great success in Germany. Byredo with their super clean design is considered a niche brand in Germany by many and very popular." Even further, she indicated, "Introducing some kind of rationality or functionality into choice certainly does not do any harm in German marketing. Popular notes that are received well in Germany include "Healthy", discreet, citric notes, vanilla and heliotrope for their comfort, clean musks for their cleanliness, freshness and comfort." And Ms Nyberg declared, "For German consumers, when they smell a fragrance, the first impression will hook them or not. In their culture, tradition is very important. You should not make something too crazy or they won't understand."



*Rene Dominik*

## RETAIL LANDSCAPE

Germany has a diverse mix of department stores, retail chains and small independents. There are two main luxury department store groups, KadeWe Group and Breuninger, plus a few single location stores including Ludwig Beck and Oberpollinger, both in Munich. Douglas is the most important chain for fragrance and prestige beauty. Ms Talarek observed, **“Germany used to have a very balanced retail landscape with Douglas as the largest chain but also a substantial share of privately owned independent perfumeries. Department stores play only a minor role. However, accelerated by digitalisation and strong price competition which reinforced one another, especially within the fragrance category, we see a shift towards online business, further concentration on chains and a shrinking independent perfumery landscape.”** Mr Dominik commented, “Most high end or niche brands usually start in independent, often owner-operated perfumeries or small chains plus the KaDeWe department store group (3 stores). Some brands keep their focus on these stores for the long run and avoid mainstream distribution via Douglas. For our brand we focus on perfumeries and department stores with a strong expertise in consulting with their clients, excellent customer service and with an appropriate brand environment.”

## CHANGING TIMES

How has the fragrance market in Germany changed in the past few years and what direction could it take in the near future? My experts had plenty to tell me.

Mr Dominik remarked that Germany “is one of the biggest fragrance markets globally and despite it being a mature, low growth market, the shifts within the market are dynamic. **The share of fragrances sold online has grown disproportionately and Covid accelerated that.**” Mr Tagscherer predicts further growth in eCommerce. “Online will be stronger and stronger, while retail loses its exclusive importance.” When asked specifically about how artisan brands have fared, he noted that the market “became more open, more luxurious, more niche-oriented.” Ms Talarek adds, “In the niche segment there seems to be a larger fraction of male consumers that are very knowledgeable with regards to fragrances and we’d expect that group to grow further.”

Indeed, niche fragrance seems to have a bright future. Mr Dominik noted, **“The demand for luxury, artistic/niche fragrances has grown steadily and many consumers trade up and pay more for individuality, luxury and alternative concepts.** Sustainable, clean and organic fragrances are developing from a niche trend into the new mainstream.” He continued, “I believe that the demand for individuality, authentic stories and 'better' product in the sense of ingredient quality, creativity, provenance and sustainability, will further rise and open new opportunities for those who listen carefully to what people actually want.” Ms Talarek is in agreement. **“Germans are interested and keen to learn about fragrance ingredients, the impact of plant extracts and aromas on their health, mood and overall condition.** About the sustainable and socially responsible sourcing of ingredients, about the safety (!) of ingredients and the actual value of the product they are buying. People in Germany will get more and more interested in understanding fragrance.”

One last comment from Mr Dominik rings true for all countries. “Another thing that changes is how we discover scents. **The times when everyone wanted to buy the latest 'big name' fragrance because it was promoted in TV ads and magazines are long gone.** Social Media and expert



consultations in stores or online, really about the individual client, become more and more important. Now brands and stores offer virtual masterclasses, fragrance selection apps, discovery sets and monthly fragrance discovery subscription services. We look at all new opportunities and test what makes sense for us.



*Haryo Sedhono*

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\*See Essencional article <https://www.essencional.com/en/posts/lenqling-perfumes-bring-us-a-balancing-whirlwind-of-emotions/>

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