

TWO EXTRACTS

- TRENDS REPORT EXTRACT
- HAIRCARE REPORT EXTRACT

■ TRENDS REPORT EXTRACT

quality
claiming



KANTAR MEDIA

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“Quality Claiming” principles

- More than the organic / non-organic opposition that was previously predominant...



UK – JERGENS



UK – BURT'S BEES

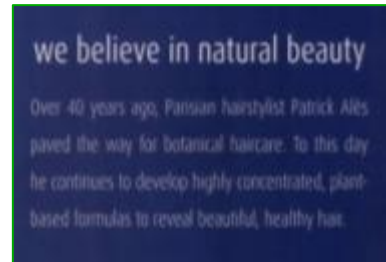


SPAIN - BABARIA



Three key focus points

We are moving toward a more global defense of cosmetic quality, expressed **in three main ways:**



- 1. Moving toward a **global** ethical message



- 2. Explaining **simple** natural methods & ingredients



- 3. Changing codes : organic **glamour** / organic **efficiency**

1. Moving toward a global ethical message

- We are seeing many "Manifesto campaigns" that are being run with a global ethical message

PHYTO



WELEDA



SIMPLE



AVEDA



For those who believe their own beauty and the beauty of the planet go hand in hand, Aveda has to be the name of choice. As the first beauty company to use 100% certified wind power in its manufacturing, Aveda has always adhered to a very unique mission: authentic beauty is one that works in harmony with the web of life.

1. Moving toward a global ethical message

- The oldest organic brands are reaffirming their legitimacy by reminding of their historic roots

US – WELEDA



GERMANY – KNEIPP



GER – Dr THEISS



JAP – DOMOHORN WRINKLE



1. Moving toward a global *ethical* message

- Integrating “eco-efficiency” with new emerging messages on eco-design initiatives

ITALY - DAVINES

BELLEZZA SOSTENIBILE



CHINA – HERBORIST



FRANCE - YROCHER

L'éco-conception, une réponse globale

FRANCE - LIERAC



L'ÉCO-EFFICACITÉ
Plus de naturalité, plus de performances, plus de sécurité. Les nouvelles formules DIOPTI sont encore plus fortement dosées en extraits végétaux ; on les aime parce qu'elles respectent la biodiversité et... la planète dans leurs tubes en aluminium 100% recyclables. Mais aussi parce qu'elles nous font les yeux doux avec des formules totalement préservées et une tolérance encore accrue. On peut les utiliser les yeux fermés !



2. Explaining simple natural ingredients

■ Transparency of simple ingredients: revival of honey and royal jelly

CHINA – AFU HONEY



CHINA – L'OCCITANE



KOREA – BATH REPAIR



JAP - HONEYLAB

2. Insisting on *harmlessness*

- A health benefit associated with the notion of respect for the skin's homeostatic balance (including non-organic products)

RESPECT FOR SENSITIVE SKIN

MA CRÈME NATURE
La crème hydratante bio à faire soi-même.

Une histoire vraie.
L'OCCITANE
EN PROVENCE

1. Préparation
2. Mélange
3. Application
4. Résultats

MA CRÈME NATURE
La crème hydratante bio à faire soi-même.

L'OCCITANE respecte avec Ma Crème Nature, sa plus simple, 100% d'origine naturelle ses valeurs biologiques de l'Occitane. Avec la fleur de safran, sa Crème Nature, son lait d'amande, se prépare dans sa cuisine traditionnelle. Cuite en bain-marie à 40°C, avec huile à la texture fondante et sensée affiner à votre peau une douce douceur, une protection de soins. Pour une peau hydratée, lumineuse, rassurée, saine et douce.

L'OCCITANE

L'OCCITANE

0% conservateur, enfin une réalité

Tolérance extrême

0% conservateur, 0% parfum, 0% tensio-actif, la garantie d'une sécurité optimale pour les peaux les plus sensibles.

Pour la première fois, le système de fermeture D.E.F.I. permet de conserver la formule absolument stérile, à l'abri de tout germe, pendant toute la durée de son utilisation.

EAU THERMALE
Avène

D.E.F.I.

DISPOSITIF EXCLUSIF FORMULE INTACTE

Avène

FRANCE AND JAPAN - AVENE

FANCL
LESS IS MORE.

JAPAN - FANCL

REN
CLEAR BIO ACTIVE DROGHE

Cleansing heaven

A rose infused cleansing balm to gently melt away dirt and make up

NO.1 PURIFY
CLEANSING BALM

100ml / 3.3 FL. OZ.

NO
PARABENS
SULFATES
PHENOLS
SYNTHETIC FRAGRANCES
SYNTHETIC COLOURS
PHTHALATES
FORMALDEHYDE
GLYCOLS
PESTS
ETC.

www.renskincare.com

UK - REN

3. Changing codes : organic efficiency

- Strong rise in arguments that complement the organic approach: commitments to concrete performance, spectacular results, etc.

US – AVEDA EMBRIGHTENMENT



FCE / GERMANY – Dr THEISS



FCE – B COME BIO



3. Changing codes : organic glamour

- We are seeing the growth of sensory-based arguments used by organic brands

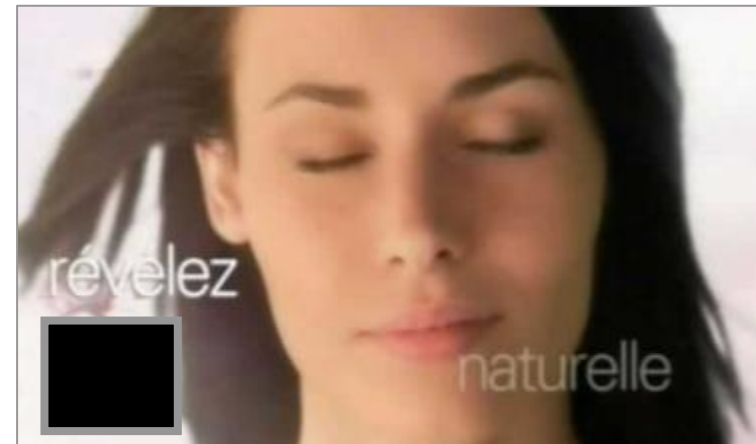
Green Glamour Cosmetics

"Laissez la nature vous sublimer"

Inter - CULTURE BIO YROCHER



beauty is born from harmony



FCE – Dr THEISS



Key points

- An ethical trend found in other sectors too, focused on the values of transparency and reinventing consumption → Brands helping people consume in a way that enables them to respect themselves and their environment



HAIRCARE REPORT EXTRACT

Hair care Semiotics



KANTAR MEDIA

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Principle

This second part aims at identifying **prevailing and emerging claims** in all product segments concerned with hair, except colouring:

- SHAMPOOS and CONDITIONERS
- STYLING products
- Moisturising, nourishing, smoothing, repairing and volume-enhancing TREATMENTS

This semiological approach to hair allows a **dynamic typology of creative trends and main innovations**, depending on the kind of product effect on hair

Contents



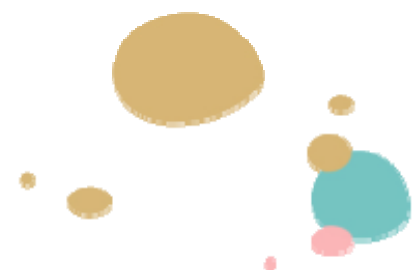
part 1- strengthened hair

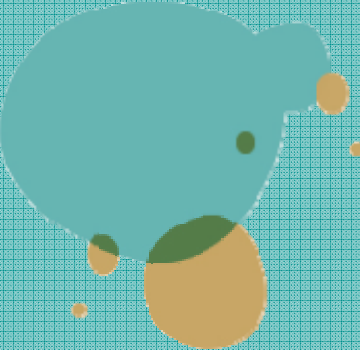
- HEALTHIER HAIR
- REPAIRED HAIR
- PROTECTED HAIR



part 2- stylised hair

- CONTROLLED HAIR
- GLORIFIED HAIR
- PERSONIFIED HAIR





1



Strengthened hair

Hair products with a therapeutic, problem-solving approach

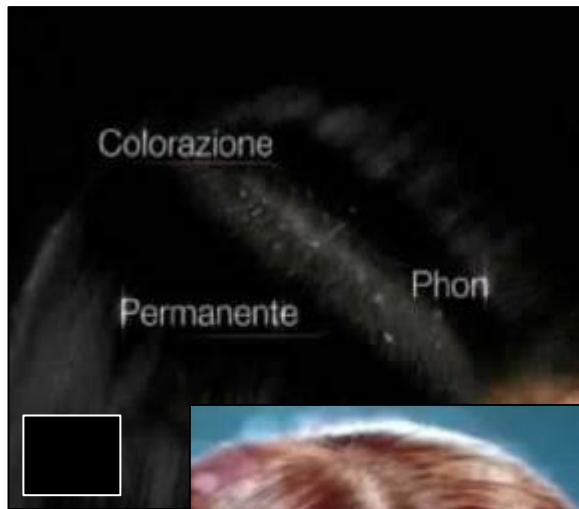
A. HEALTHIER HAIR

Education on causes / external stress

Etiological messages providing explanations for the phenomenon of damaged hair: stress, pollution, cold, perms, colouring, etc.

International campaign- HEAD & SHOULDERS

Italy - CLEAR



UK - HEAD & SHOULDERS



Japan - HEAD & SHOULDERS

A. HEALTHIER HAIR

Education on causes / feminine imbalances

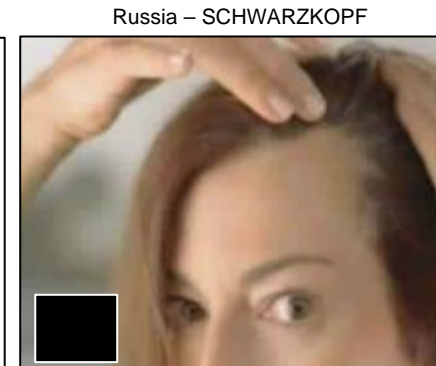
Increased visibility on the taboo subject of hair loss for women: use of a highly aesthetic testimonial to make the problem less alarming / realistic evocation of symptoms



Spain – VICHY



Spain – DOVE



China – PANTENE

A. HEALTHIER HAIR

Education on solutions / stimulating action

New message on the health of the hair and especially the scalp; spotlight on the combination of treatment with a massage (education on professional techniques for appropriation on a daily basis), designed to stimulate the scalp.

China – PANTENE



Japan - H&S

KÉRASTASE PHILOSOPHY

P×4: KÉRASTASE 4 VALUES
美の哲学・ヘアケアの神髄、ケラスタゼの4つの価値

ヘアケアの哲学・ヘアケアの神髄、ケラスタゼの4つの価値

PROFESSIONAL
プロ用製品

PERSONAL CARE
個人用の日常ケア製品

PERFORMANCE
高機能ヘアケア製品

PLEASURE
最高のヘアケア体験

China – KERASTASE



Japan – KOSE



A. HEALTHIER HAIR

Education on solutions / relaxing action

An ambition to revitalise the hair in depth, associated increasingly in Asia with spa treatment.



China – PANTENE

Japan – H&S

潘婷 PANTENE PRO-V

强韧升华 Spa 般深度护养

潘婷 PANTENE PRO-V

新登场 深层滋养发膜

七重修护发膜深层护发, 丰润滋养的质感, 让秀发一试难忘!
从这个星期开始, 每周为头发做一次秀发 Spa™, 给秀发健康保障!

深入发芯 3 效滋养强韧

【强韧修护发膜】: 层层渗透, 直达发根发源, 滋养补充发芯营养*
【深层滋养配方】: 如营养师为发丝最佳方案, 从根本上强健发质*

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China – PANTENE

Conclusion

sophistication of hair treatments based on two approaches: healthiness/appeal

- In a hair market that has remained sluggish for the last few years and looks set to suffer even more as a result of the crisis, brands are diversifying their promises and putting the accent on innovation.
- This strategy of "added value" development goes hand in hand with a fragmentation of the market, with the aim of responding to a wide range of requirements and providing solutions based on two approaches: healthiness and appeal
- Firstly, we can observe the medicalisation of concepts and promises, in line with the neo-protecting trend (in a fairly similar way to skincare).
- Secondly, as with the make-up market, brands are attempting to create a "lipstick effect", and hair products are adopting increasingly sophisticated promises and concepts.