



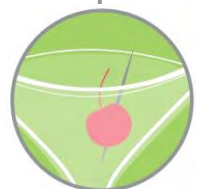
hair today – what's happening in hair care?



**Educational Seminar
October 19, 2017**



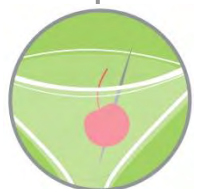
trendincite



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Inspiration for Creation

agenda

- Hair Care
 - consumer behavior
 - numbers at a glance
- Trends
 - food grade
 - au naturel
 - vegan
 - recycled packaging
 - anti-pollution
 - multicultural
 - other activity
 - color changing
 - color saving
 - silver lining
 - unique applications
 - hair care gets personal
 - high tech
- Future of hair care



millennial consumer behavior

According to Euromonitor, **millennials are out-using all other generational groups on every major product category when it comes to hair care.**

Hair care products used 3-5 times a week, key findings:

- **Shampoo: 32.9% of millennials are using these products at the above frequency, compared with 31.8% of Generation X and 28% of Baby Boomers**
- **Conditioner or Treatment: 24.3% of millennials, compared with 20.5% of Generation X and 14.8% of Baby Boomers**
- **Hair styling products: 13% of millennials, compared with 12.2% of Generation X and 9% of Baby Boomers**

- Cosmeticsdesign-europe.com 1/25/17

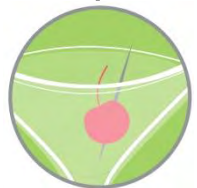


millennial consumer behavior (con't)

Cloud 10 Millennial Hair Care Report

- **59% of women polled wish they had someone else's hair**, or are only happy with their hair sometimes
- **77% prefer shampoos and conditioners customized for their particular hair care needs**
- **Only 15% of Millennials choose to wash their hair daily**. Most prefer to wash it 2-3 times per week
- **An overwhelming 88 % say scent plays a factor in purchasing shampoos and conditioners**. In that group, about half say it's "very important."
- **22% of Millennials say they would never use a shampoo or conditioner that contains sulfates or parabens, while 34 % have no idea what they are**
- Stronger hair topped Millennials' hair care goals. Reducing dryness and taming frizz followed in importance
- **Millennials shop everywhere for hair care formulas, with nearly a quarter shopping online**
- Bad hair day? **30% opted for a bun while 29% chose a ponytail**

- Cloud10hair.com 10/12/17



consumer behavior

During an interview, **Birchbox** CEO Katia Beauchamp said **a large portion of the company's growth can be attributed to their hair care business**. Those who tried hair care products in Birchbox samples were increasingly returning to the site for full-size products from higher-priced brands. Beauchamp said **17% of all prestige hair care products are sold on Birchbox, and full-size products now account for 35% of the company's overall business**.

- L2inc.com 4/18/17

Unilever & Vice's digital agency Carrot tapped **a group of influencers to try Evaus (Suave spelled backward) in a drab, minimalist packaging, which housed the same products as what Unilever sells at Walmart**.

These influencers tried Evaus products for two weeks and then were invited to a studio to reveal the truth. **They spoke very highly of the products and were shocked to discover they had been using a mass-market brand**.

-AdAge.com 4/19/17



numbers at a glance

The global professional hair care market, led by products such as shampoos and conditioners, hair colorants, straightening and perming products, and hair styling products, is expected to grow at a CAGR of nearly 4% through 2020, according to Technavio.

- GCIImagazine.com 11/17/16

The shampoo market is slated to reach U.S. \$31,900 million by 2022, according to Persistence Market Research.

- Globenewswire.com 9/29/17

According to NPD, there has been a 66% sales increase in dry shampoos due to the rise of wellness and the athleisure-centric trend.

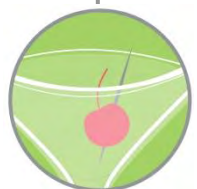
- GCIImagazine.com 4/17/17

The global dry shampoo market is projected to grow at a CAGR of 6.1% during 2017 – 2023, according to P&S Market Research.

- PSMarketResearch.com April 2017

According to Transparency Market Research, the global dry shampoo market is expected to reach U.S. \$4,110.6 million by 2022.

- Marketwatch.com 10/3/17



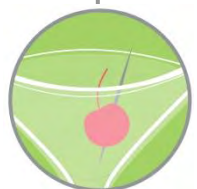
numbers at a glance

Styling saw strong current value growth of 5% in 2016 to reach sales of USD \$2.4 billion. This growth was **predominantly driven by strong demand for beard care products, including balms and oils,** according to Euromonitor.

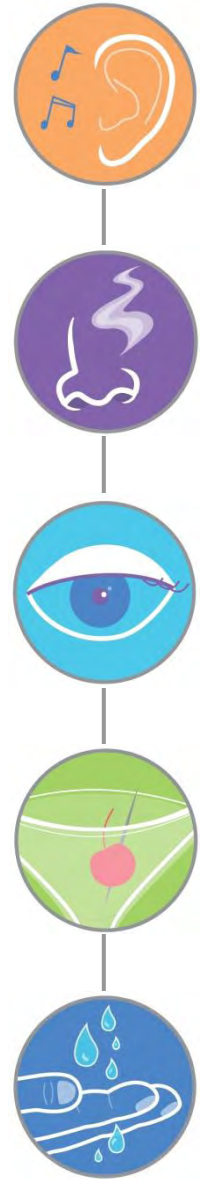
- Euromonitor.com May 2017

According to IBISWorld Industry Market research, **the U.S. hair loss treatment industry is expected to earn a revenue of \$3.6 billion** in 2016 and expected to grow over the next five years to 2021.

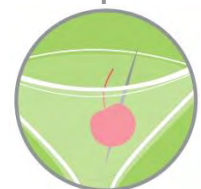
- Gcimagazine.com 12/19/16



food grade ingredients

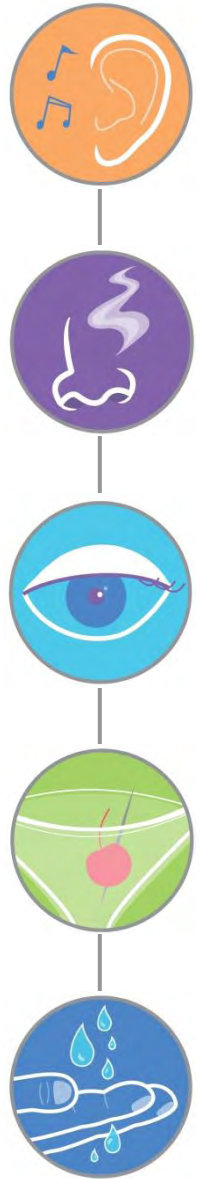


au naturel

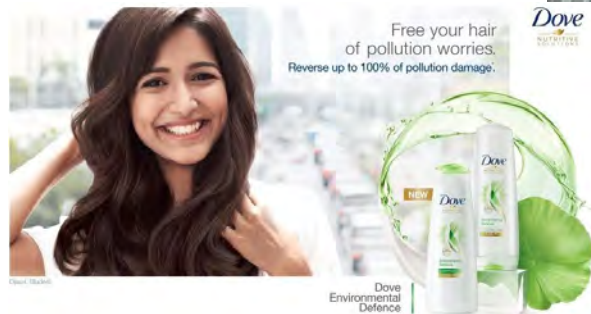
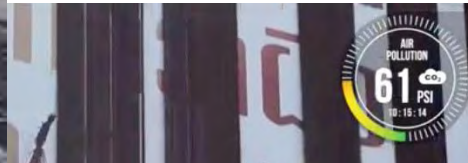




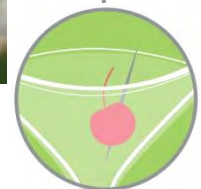
recycled packaging



anti-pollution



multicultural





REDKEN
3TH AVENUE NYC

clean maniac
micellar
clean-touch shampoo
silicone and sulfate-free system

10.1 fl oz 300 ml

NEW
with 90% more
SPUN SHIPS

Schwarzkopf
GLISS
HAIR REPAIR
WITH LIQUID
KERATIN
OIL NUTRITIVE
SHAMPOO
8 BEAUTY
TIPS
NOUVÉLÈMENT &
L'ÉPILÉ
POUR LONGUE HAIR
PHOTO TO SPIN HAIR
8



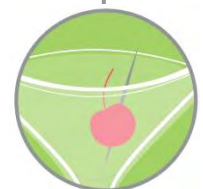
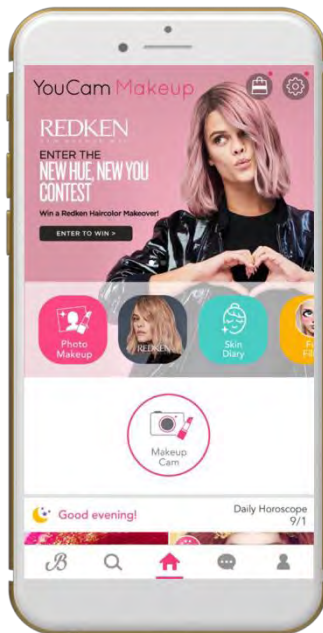
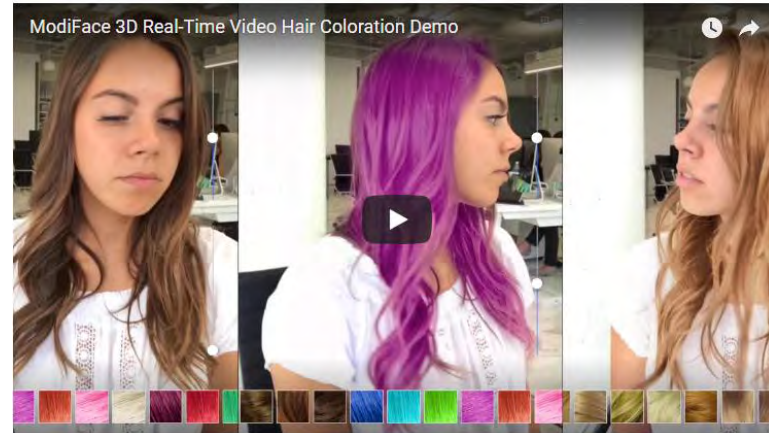
MARAJÓ MARAJÓ

HAIR CARE

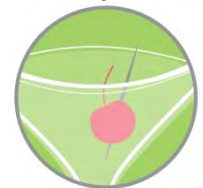
DEEP TREATMENT BUTTER

ACCOMPLISH CLEANSE & CRÈME

color changing



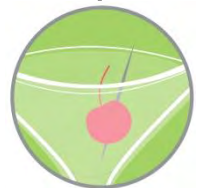
color saving



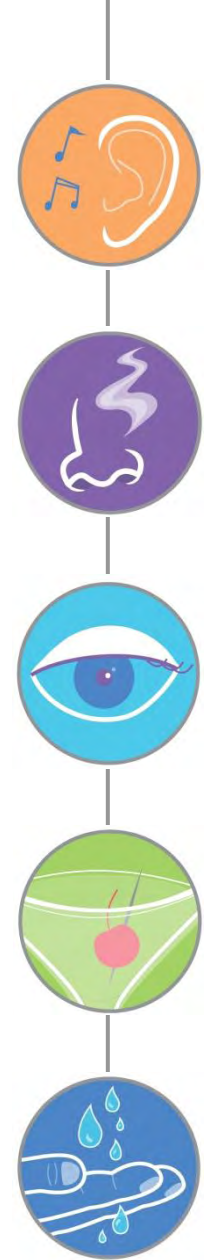
silver lining



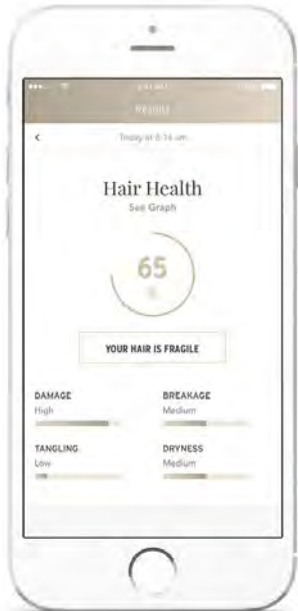
unique applications



hair care gets personal



high tech



future of hair care

Product benefits claims, protection claims and ergonomic packaging will all take centre stage for brands looking to capitalize on the 'Active Beauty' trend.

In 2017 and beyond, expect to see products that shield the hair and skin from exposure to pollution, ultraviolet (UV) and infrared (IR) light...

-Intel.com 2/16/17

As anti-pollution benefits are now expanding beyond skin care ranges into hair care and color cosmetics, products are placing overt claims on their packaging to highlight the inclusion of ingredients and functions that offer specific pollutant protection.

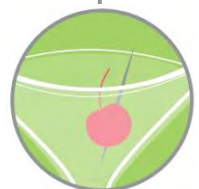
-Cosmeticsdesign-asia.com 6/4/17

Hair is going through an immense amount of stress from highlighting, coloring and heat tools. Now it can be rebuilt with bond rebuilders that nurse hair back to health.

-Newbeauty.com 12/8/16

Consumers are more knowledgeable and familiar with the chemical ingredients found in cosmetic products. Using familiar and natural ingredients, as well as creating formulas free from certain chemical ingredients, is key to appeal to the modern consumer. Natural ingredients and organic formulations are becoming a standard within the industry.

-Stephensonpersonalcare.com 8/1/17





thank you!

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