The latest wave in hair care: A surge in multi-functional products

In Cosmetics, Barcelona 2015
Sandra Catarino, Hair Care Business Development
« The most important thing I have to say today is that hair matters. Pay attention to your hair. Because everyone else will. »

Hillary Rodham Clinton, speaking to the 2001 graduating class at Yale College
« You are your hair »

Self-esteem  Beauty
Identity  Feminity
Personality  Freedom

50,000-60,000$ spent by women on their hair in a lifetime

2 hours a week spent by women washing and styling their hair

Sources: Sociological study, Arizona State University, Rose Weitz (ASU Insight Feb 6, 2004)
Huffingtonpost.com, « Hair and History: Why Hair Is Important to Women », 07/08/2014
Hair trends: What’s in? What’s to come?

**GREEN**
- « Free from » (EU, NA)
- Natural ingredients

**CLEAN**
- Children & teenagers
- Scalp & hair: anti-dandruff (AP)

**BEAUTY**
- Multifunctional claims imported from Skin Care: BB, CC… (EU, AP)
- Shampoo alternatives (NA)
- Natural oil treatments, moisturizing (LA)

**AGEING**
- Increased damage over time
- Hair loss
- Repeated damaging treatments
Solvay’s Innovation in Hair Care
Close to trends, answering consumers needs

Hair Damage Level
1-2
3-4
4-5

ECO-CONSCIOUS
- Hair
  - All hair types
  - Eco-conscious consumers
- Needs
  - Clean, Care, Volume, Repair
  - Environment friendly
  - No performance compromise

MILD & CLEAN
- Hair
  - Anti dandruff
  - Oily
  - Men
  - Kids
- Needs
  - Mild hair cleansing
  - Gentle products to avoid irritancy and prevent scalp regreasing
  - Light conditioning

VOLUME
- Hair
  - Fine
  - Damaged Fine
- Needs
  - Clean, and care
  - Moderate conditioning for detangling
  - Care with clean roots
  - Hair volume

CARE
- Hair
  - Normal
  - Dry
  - Damaged
  - Brazilian
  - Colored
- Needs
  - Balanced routine between care / clean
  - Mild cleansing to prevent further damage
  - Moderate care for shine and nutrition

INTENSE REPAIR
- Hair
  - Ultra-damaged
  - Straightened
  - Bleached
  - Highlighted
- Needs
  - Rich texture
  - Delicate cleansing
  - Intense repair from roots to tips
  - Cure of damage

Hair Needs
- Ultra-damaged
- Straightened
- Bleached
- Highlighted

Hair Needs
- Rich texture
- Delicate cleansing
- Intense repair from roots to tips
- Cure of damage
What's new on the shelves?

Dove Hair Therapy Damage Solutions
Intensive Repair

L'Oréal Elseve Total Repair Extreme
Reconstructing Shampoo

This conditioner deeply nourishes and leaves very dry and frizzy hair softer and supple. Its highly moisturizing formula soothes sensitive scalps, especially after color treatments and hair straightening. Both a shampoo and a conditioning cream, Crème aux Fleurs leaves hair silky and easy to comb.

Cleansing Conditioners

2-in-1 product saves the usual conditioning step with additional rinsing after relaxing of ethnic hair and will therefore save more than 15,000 cubic meters of water and 200 tons of CO2 in 2015.

Press Release Henkel, Innovation Award Solvay

All-in-1 Shampoos

Source: Mintel, Shampoos launched less than 1 year ago, WW
Intense Repair

It’s in Solvay Showroom...
All-in-1 shampoo with [shampoo + conditioner] performance

In vivo salon half-head test - Medley Coiffure
2 Caucasian women with Long Damaged Hair (last shampoo 2 and 3 days before test)

4 in 1 Revolution
Benchmark: Combination of shampoo + conditioner for Dry, Frizzy hair

4 in 1 Revolution is a Structured Surfactant Liquid:
- Time and water saving
- Faster drying (~25% reduction on natural drying)
- Other benefits similar as benchmark (shampoo + conditioner)

Scale “Care Level”
1 much too light
2 too light
3 just right
4 too pronounced
5 much too pronounced

Scale
1 very bad
2 bad
3 medium
4 good
5 very good
Intense Repair

It’s in Solvay Showroom...
Total Repair Shampoo for Ultra Damaged Hair

In vivo salon half-head test – Dr Schrader Institute
20 women with medium long strong damaged hair (dyed every 4 to 6 weeks)
Results after 2 product applications

Extreme Repair Shampoo delivers:
- Improved curl retention
- Improved anti-electrostatic effect
- Improved lightness
- Other performance similar as leading benchmark

Scale
1 very bad
2 bad
3 medium
4 good
5 very good
Intense Repair

It’s in Solvay Showroom...
Cleansing Conditioner for dry frizzy hair

In vivo salon half-head test - Medley Coiffure
Results on 1 woman with short, frizzy hair (bleached and colored 10 days before test)

Preliminary results
Solvay’s Co-Wash outperforms the benchmark with:
- Efficient cleansing of dry hair
- Intensive conditioning
- Easier hair brushing and smoothening

Further work ongoing to adapt Co-Wash to other hair targets!

Scale “Care Level”
1 much too light
2 too light
3 just right
4 too pronounced
5 much too pronounced

Scale
1 very bad
2 bad
3 medium
4 good
5 very good
L'Oréal Extraordinary Oil Nutrition Shampoo features a caring formula aimed at dry hair, enriched with 6 micro-oils from rare flowers for intense nutrition, softness, endless fluidity and infinite shine.

Pantene Pro-V Rizos Definidos Shampoo (Defined Curls Shampoo). Salt-free product providing curly hair with structure memory for defined curls that last up to 24 hours.

Sulfate free, colour care system designed for coloured, weakened hair, dry hair, said to respect fibre while protecting colour, providing gentle moisture care and a cleansing action with a high-foaming lather, leaving hair feeling nourished.

Clear oil-infused Shampoos

Salt-free shampoos

Source: Mintel, Shampoos launched less than 1 year ago, WW
Solvay’s Oil Infusion shampoo:
- Is transparent
- Shows a positive trend on improved **softness**
- Delivers **improved shine**
- Other performance similar as leading benchmark
- Is effective on Caucasian and Brazilian hair

**Further work to increase oil content (up to 2.5%) keeping acceptable cleanliness**
It’s in Solvay Showroom...
Sulfate-free conditioning shampoo for Damaged Hair

In vivo salon half-head test - Medley Coiffure
Preliminary results: 1 Caucasian woman with **Medium Long Fine Hair** - colored, highlighted (last shampoo: 3 days before test)

*Solvay’s Go Pure shampoo:
- Is sulfate-free
- Contains less than 12% active surfactant
- Delivers improved lightness
- Provides good foam (flash, volume)
- Other performance similar as leading benchmark
Volume

What's new on the shelves?

Schwarzkopf Gliss Hair Repair Hair Refill Shampoo, developed for brittle and thin hair, with Hyaluronan Complex. Strengthens and regenerates the hair from inside, for a voluminous, supple, full and smooth look. Helps repair damage on the surface and deep within hair, leaving it feeling healthy and looking younger.

Hair Refill Shampoos

Schwarzkopf Gliss Hair Repair Ultimate Volume, formulated with the Liquid Sea-Collagen complex and liquid keratin, is a silicone-free range designed to repair fine, dull, damaged hair and offer volume without weighing it down.

Repair Leave-in sprays

L'Oréal Elvive Fibrology Thickening Shampoo, formulated with Filloxane, an ingredient said to penetrate the hair and spread inside the fibre, leaves hair with an immediate thicker feeling, and offers a cumulative effect after each application. This shampoo offers a long-lasting thickening effect, and adds more body and bounce.

Texture/Volume shampoos

Source: Mintel, Shampoos launched less than 1 year ago, WW

*Volume and Texture
It’s in Solvay Showroom…
A Nourishing Milky Shampoo for Fine Hair

Consumer test on 33 Caucasian women—ProDerm
Fine Moderately Damaged Hair

Pump your hair up shampoo delivers:
- Silicone-free conditioning adapted to hair target
- Balanced cleansing / care
- No volume loss over washes

66% of consumers would buy this formulation!

Scale
-2  Fully disagree
-1  Rather disagree
 0   Neither…nor
 1   Rather agree
 2   Fully agree

Wet hair can be easily combed
Dried hair can be easily combed
Hair feels soft and supple
Hair looks shiny
The product does not weigh down the hair

Pump Your Hair Up
Mild & Clean

What’s new on the shelves?

Clear Men Scalp Therapy Complete Care 2in1 Anti-Dandruff Daily Shampoo & Conditioner is claimed to control dandruff symptoms at the source and provide nourishment to the hair and scalp.

TRESemmé Cleanse & Replenish Deep Cleansing Shampoo for all hair types is designed to clarify hair, remove build-up, pollutants and residues, and restore the hair’s natural vitality. Described as gentle enough for daily use, it is said to deeply purify hair to give a salon-fresh feeling.

Suave Kids White Grape 2 in 1 Shampoo + Conditioner features a tear-free, hypoallergenic and easy on eyes formula. It gently combines shampoo and conditioner to act in one sure and speedy step. The product is claimed to have a gentle conditioning formula, which eliminates tough tangles right after shampooing.

Deep Cleansing Shampoo

2 in 1 Shampoo + Conditioner

Source: Mintel, Shampoos launched less than 1 year ago, WW
### Pure & Clean Shampoo

<table>
<thead>
<tr>
<th>Consumer Benefits</th>
<th>Formulator Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ultra Mild Cleansing</td>
<td>Optimized cost-effective system</td>
</tr>
<tr>
<td>Anti-dandruff</td>
<td>Low surfactant shampoo</td>
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<tr>
<td>Clean scalp</td>
<td>Zinc pyrithione stabilization</td>
</tr>
<tr>
<td>No itching</td>
<td></td>
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</tbody>
</table>

Solvay’s Pure & Clean shampoo:
- Is suitable for **very mild cleansing**
- Delivers **improved foam richness and creaminess, and rinseability**
- Is easy-to-process
- Contains Rheomer® 33T: an ideal rheology modifier in low-surfactant shampoos
What's new on the shelves?

Natur Vital Bio Champú Reparador (Bio Repair Shampoo) provides maximum hydration and nourishment, leaving hair hydrated, radiant, shiny and soft. It contains 99.63% natural and 10% organic ingredients. The EcoCert-certified, eco-friendly and carbon neutral product is said to ensure maximum biodegradability, is free from colourants, parabens and silicones.

**ENVIRONMENT:**
Biodegradability, Ecotoxocity

Klorane Dry Shampoo with Nettle is suitable for oily hair and is claimed to control oil allowing **less frequent shampooing**.

Lush shampoo bars: 1 soap = 80 applications = 3 large shampoo bottles

**WATER SAVING, LESS CHEMICALS:**
Dry, Solid,

Urtekram Aloe Vera Shampun' (Shampoo for Normal Hair) is designed to restore and strengthen dry hair. Suitable for vegans, the 100% natural product contains 13% organic ingredients certified by **Ecocert Greenlife** and **Cosmos Organic**.

**LABELS:**
Cosmos, Ecocert,..
## Eco-Conscious Biodegradable Shampoo

<table>
<thead>
<tr>
<th>Consumer Benefits</th>
<th>Formulator Benefits</th>
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<tbody>
<tr>
<td>Hair cleansing and conditioning</td>
<td>Smart choice of biodegradable surfactants and polymers <em>(Jaguar® LS)</em></td>
</tr>
<tr>
<td>For normal to damaged hair</td>
<td>Easy to formulate</td>
</tr>
<tr>
<td>Less chemicals, Improved Biodegradability</td>
<td>Easy to process surfactant base</td>
</tr>
<tr>
<td>Natural-based, Environment-friendly</td>
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</tbody>
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## Eco-Conscious Solid Shampoo

<table>
<thead>
<tr>
<th>Consumer Benefits</th>
<th>Formulator Benefits</th>
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<tbody>
<tr>
<td>Solid concentrated shampoo</td>
<td>Foam boosting with Mackol® CAS 100N</td>
</tr>
<tr>
<td>Water saving</td>
<td>Shine improved without silicone</td>
</tr>
<tr>
<td>Silicone-free</td>
<td>Light hair care</td>
</tr>
<tr>
<td>Environment-friendly</td>
<td></td>
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</table>

## Eco-Conscious Label Shampoo

<table>
<thead>
<tr>
<th>Consumer Benefits</th>
<th>Formulator Benefits</th>
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</thead>
<tbody>
<tr>
<td>Contains COSMOS approved ingredients <em>(Jaguar® Excel, Miranol® C2M Conc NP)</em></td>
<td>Easy to formulate</td>
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<tr>
<td>Hair cleansing</td>
<td>Easy-to-disperse anionic system</td>
</tr>
<tr>
<td>For normal to damaged hair</td>
<td>PEG-free formula</td>
</tr>
<tr>
<td>Less chemicals, Improved Biodegradability</td>
<td>Mildness and foam boosting</td>
</tr>
<tr>
<td>Natural-based</td>
<td>Tunable hair conditioning</td>
</tr>
<tr>
<td>Environment-friendly</td>
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Formulation developed by SACI-CFPA, distributor of SOLVAY in France
This and much more...