An alternative to split ends trimming
Solvay launches Polycare Split Therapy!
AGENDA

- Market perspective: What solutions against split ends?
- Mending of split ends: What’s the challenge?
- Polycare® Split Therapy: Solvay’s latest launch in hair cure
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Many causes to split ends
Split ends…

…A sign of unhealthy hair

1 solution

trimming
How often do you need a haircut?

Every 12 weeks, with an average price of 45 USD

An annual budget of 180 USD

If I had a treatment against split ends, I could let my hair grow longer

Source: Haircut prices worldwide, Business Insider UK (Sept 2015)
Alternatives to trimming exist

Leave-on (treatments): the leading category in «split ends» claims

- Hair Treatments: 42%
- Shampoo: 32%
- Conditioner: 22%
- Hair Styling: 3%
- Hair Colorants: 1%

Treatments are the leading category for ‘split ends’ claims

GNPD, WW, 885 products, less than 1 year ago, all hair care product categories, claiming «split ends»
Only 10% new products claim Cure of Split Ends

Most split ends claims are about « repair »

- Split ends mend: 72%
- Split ends seal: 21%
- Split ends repair: 7%

Asia and EMEA are leading in split ends CURE launches

- AP: 33%
- EMEA: 27%
- LA: 22%
- NA: 18%

GNPD, WW, 89 products, less than 1 year ago, all hair care product categories, containing « split ends » + mend or seal or repair
2 to 3 more value in the split ends **SEALING** claim

<table>
<thead>
<tr>
<th>Selling price (€/kg)</th>
<th>Generic</th>
<th>Split ends repair</th>
<th>Split ends mend</th>
<th>Split ends seal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shampoo</td>
<td>28</td>
<td>25</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Conditioner</td>
<td>13</td>
<td>25</td>
<td>28</td>
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<tr>
<td>Treatment</td>
<td>79</td>
<td>100</td>
<td>73</td>
<td>190</td>
</tr>
<tr>
<td>Styling</td>
<td>41</td>
<td>115</td>
<td></td>
<td>144</td>
</tr>
</tbody>
</table>
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Some technologies used for split ends cure rather claim prevention and conditioning.
Split End Mending
Technology Objectives

More Versatile
than current systems (easy to use, compatible and efficient in rinse-off formulations as well as leave-on)

Performance
delivers at least same or improved results ( > 80% ends repair)

Long-Lasting
Resist several combing Cycles

Non Sticky
Improved sensorial performance
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Solvay’s hair Care & Cure offer

1. **CARE**
   - Moisturizing
   - Mild Cleansing
   - Conditioning

   Sulfate-free shampoo
   Oil Infusion shampoo
   BB Cream shampoo…

   **JAGUAR®**  **MIRAPOL®**

2. **CURE**
   - Deep Repair
   - Split ends sealing

   **INNOVATION 2017**

   **POLYCARE®**
Split ends and damaged cuticles

Multi-split end

Single split end

Scanning Electron Microscopy
How does Polycare® work after 1 serum application?

- Hair surface looks smoother, cuticles are partially repaired
- Partial sealing of split ends, sufficient to bring the splits together
- Bridges between split ends parts

Scanning Electron Microscopy
How does Polycare® perform after 3 serum applications?

After 3 applications, split ends are fully sealed and cuticles layed down

Scanning Electron Microscopy
Consumer-perceivable repair evidenced by microscopy

Single split end
Before treatment
After treatment

Multi-split end
Before treatment
After treatment

Split ends are fully sealed after 1 serum application
Hair ends diameter appears thicker, and looks healthier

Optical Microscopy
In a nutshell...

More than 90% split ends sealed from 1st use

No volume loss
Non greasy, non sticky

Solvay simplified serum (tested on 5 hair kits): water, 10% ethanol, 1% glycerin, 0.5% Polycare®, 0.5% panthenol, sodium benzoate
Shampoo: 12/2 SLES/CAPB, 0.5% Polycare®, 1.2% NaCl
Split Therapy Shampoo - Repair: Up to 60%

AQUA, SODIUM LAURETH SULFATE, COCAMIDOPROPYL BETAIN, GUAR HYDROXY PropylTrimonium Chloride, POLY Care® SPLIT THERAPY, CARBOMER, DIMETHICONE, OPACIFIER, PRESERVATIVE

Split Therapy Serum – Repair: 90%

AQUA, CETEARYL ALCOHOL, GLYCERYL STEARATE, PEG-100 STEARATE, BEHENTRIMONIUM METHOSULFATE, POLY Care® SPLIT THERAPY, AMODIMETHICONE, CITRIC ACID, PRESERVATIVE

Formulations chassis can be tuned to adapt the sensorial profile to hair types.
A new Functional Ingredient creating value for...

**PLANET**
1. Vegetable-based, less non-renewable resources used, RCI > 70%
2. Non-ecotoxic, Non-irritating
3. 100% active, less non-renewable packaging and transportation emissions

**FORMULATORS**
1. Polycare® Split Therapy can be used directly in the formulation, no premix needed
2. Cold process, compatible with rinsed-off and leave-on chassis

**CONSUMERS**
1. Perceivable and durable split ends repair, from first use and onwards, after combing or washing
2. Pleasant texture and spreadability, without stickiness on hands and hair
3. Split ends mending performance without sensory negatives on hair (weighing down, oily feel, flakes)

1. Polycare® Split Therapy can be used directly in the formulation, no premix needed.
Polycare® Split Therapy

- Natural-based and non-ecotoxic
- Cost-effective
- Easy-to-process
- Heals at least 90% split ends after 1 use
- Resists combing
- Can be used across end-products categories
Thank you for your attention
Visit us on stand K10!