

Beauty 2025

Mintel BPC Trends

March 23, 2016



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AGENDA

What's happening now?

What does the future look like?

01 Augmented Human

02 Gastronomica

03 Power Play

04 Water, the new luxury

AUGMENTED HUMAN

The line between human and technological device is blurring as smart technology puts people in greater control of their individual health and beauty needs





WHY IS IT IMPORTANT: THE AMERICAS

47%

US consumers would be interested in trying a facial skincare product with integrated diagnostic tools^

39%

US consumers are interested in using a mobile app to track their health^^

42%

US consumers are interested in clothing with sensors that can detect diseases, conditions or ailments^^

18%

US consumers own a wearable fitness tracker^^^

45%

US consumers would be interested in bracelets or necklaces that change colour when it's time to reapply sunscreen; 33% would be interested in an app that does the same job^^^^

Source: Lightspeed GMI/Mintel

Base: US internet users aged 18+ (^ 1926 who use facial skincare products; ^^ 2000; ^^1779 who exercise; ^^^ 1867 who use sun protection and/or tanning products)

WHAT'S NOW

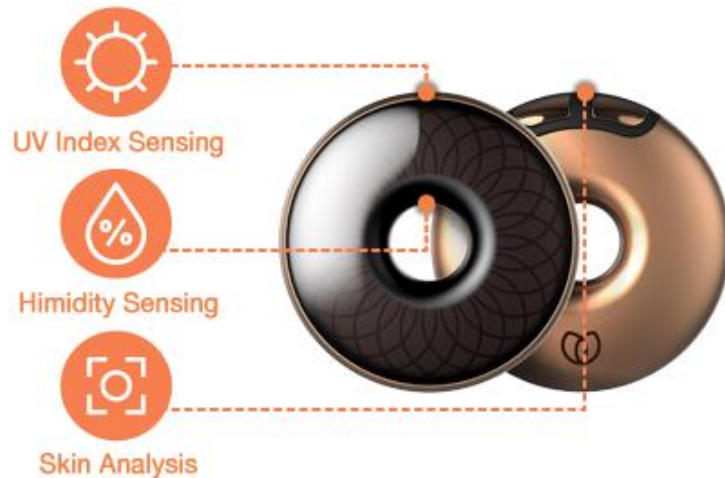


FACIAL FIT-BIT

Way personal skincare companion uses biometric sensors to collect data from your skin and surroundings, provides skincare tips on your smart device

• TECHNOLOGY •

How does WAY work?



BIA Skin analysis : Bioelectric Impedance Analysis, which employs bio impedance as the measuring theory (impedance belongs to one of the resistances in which, the non-conductor effect is also involved)

CONNECTED & PERSONALIZED

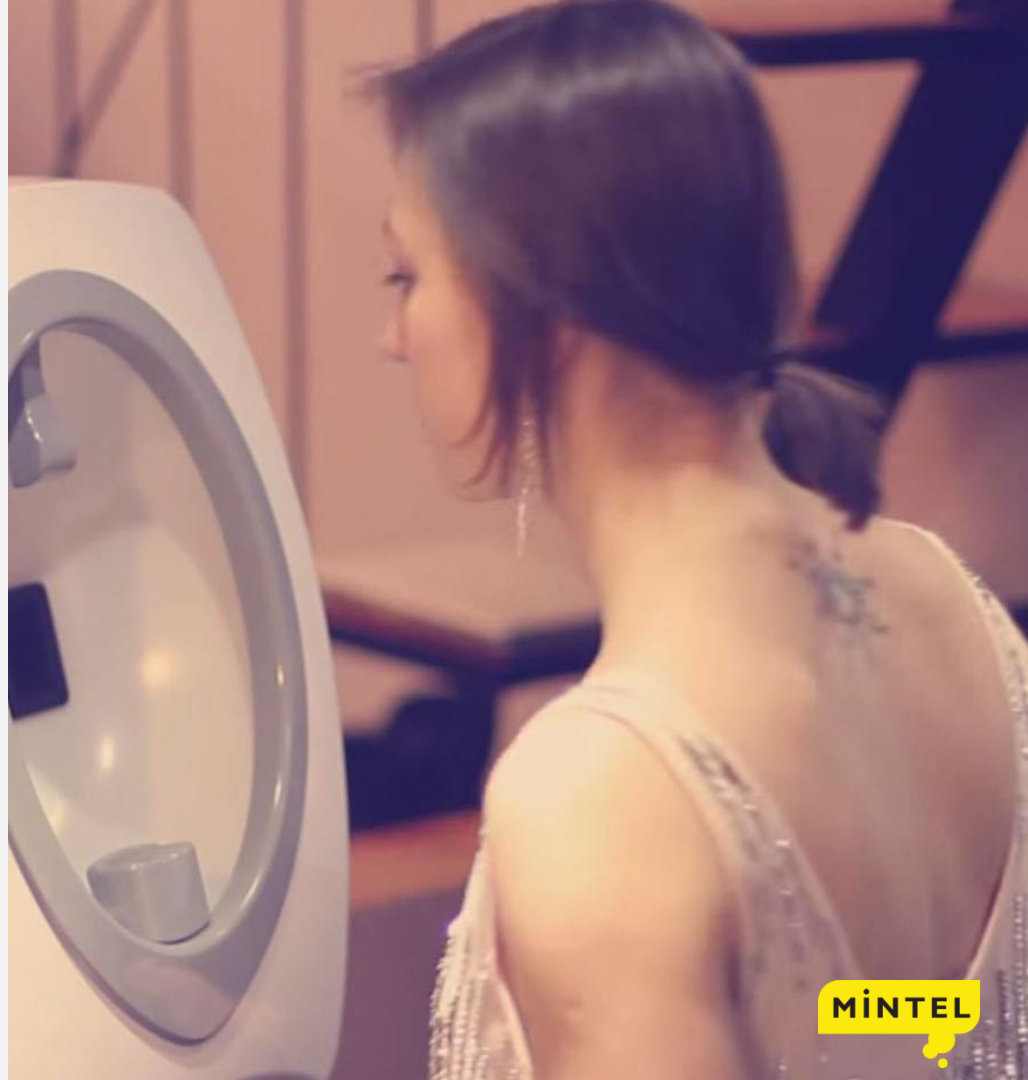
Romy Paris' Figure "beauty assistant" blends encapsulated active ingredients into a serum or cream for the skin's specific needs, determined by a smartphone app



DIGITAL MAKEUP

Foreo Moda is billed as the world's first digital make-up artist. It combines 3D printing and facial scanning technology to create full cosmetic looks in just 30 seconds

Adorn is a pen pre-loaded with a mix of blue, black and white pigments. A built-in scanner detects your skin tone and mixes and dispenses a shade that perfectly matches your complexion



TRACKING VITAMIN D AND UV

—

Violet is said to be the first wearable that tracks daily vitamin D production, monitors sun exposure and alerts the user to potential skin damage

L'Oréal just introduced My UV Patch at CES. The flexible sticker connects with a smart device to monitor UV exposure



WHAT'S NEXT



INDUSTRY: 3D PRINTED SKIN

Brands will offer 3D photos of consumers and supply printed close-ups of their skin and hair so they can track the performance of products over a trial period



INDUSTRY: CONNECTED CLOTHING

MIT Media Lab is working with natto cells to create “living” clothes. The cells expand and contract in response to atmospheric moisture. Such cells could be programmed to release scents or cooling/heating agents in response to stress and climate-related changes in temperature



GASTRONOMIA

The saying goes, “it’s what’s on the inside that counts”. Interest in natural ingredients is on the rise as more people dare to roll up their sleeves and get involved in the process of creating beauty products.





WHY IS IT IMPORTANT: THE AMERICAS

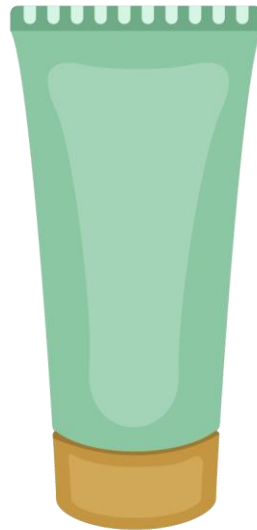
13% of US women who use facial skincare often make their own products; 16% use common ingredients instead of facial skincare products^



21% of US consumers look for skincare products with as few ingredients as possible^



55% of US natural and organic personal care buyers do so because they believe they are better for their skin or hair^^



Source: Lightspeed GMI/Mintel

Base: US internet users aged 18+ (^ 970 women who use facial skincare products; ^^1211 who buy NOPs)

WHAT'S NOW



EXPERT MEALS

Services like Plated and Hello Fresh allow users to cook chef-designed meals in the comfort of their own homes



DIY COSMETICS

Njud is a do-it-yourself at-home cosmetics kit designed to give consumers control over ingredients used in their beauty products



PUT A MASK ON IT

MKS in China and PNC International in South Korea have developed hydrogel mask machines for the home. Consumers can use any fruit and/or vegetable juice and mix them with natural thickeners, creams and serums to create a personalised face mask



FERMENTED BEAUTY

Beauty Chef is an Australian organic brand founded by Carla Oates, a naturapath and author. Based on the philosophy that “beauty starts in the belly” the range includes inner and outer beauty products that contain bio-fermented ingredients and pre and pro biotics. They are said to work closely with the body’s biorhythms to create healthy, radiant skin



SIMPLICITY IN LABELING

More than 7 in 10 US consumers agree that there are probably more harmful or excess ingredients in foods than manufacturers are telling them



BELIF – CLEAR COMMUNICATION

Skincare brand Belif from South Korea has brought the concept of 'clean labels' to cosmetics, calling out product benefits and ingredients on the front of the pack



100% VEGETARIAN | 80% VEGAN

Ingredients are fresh, organic, natural, and safe

LUSH
FRESH HANDMADE COSMETICS



The Olive Branch Shower Gel

Formulated with fresh
mandarin juice and fair
trade olive oil



Happy Happy Joy Joy Formulated with rose and orange blossom waters and almond milk



Ayesha Fresh Face Mask

Formulated with fresh
asparagus and kiwi and
honey

FEED YOUR SKIN A RAW FOOD DIET

Pioneers in organic skincare and haircare using the purest and most potent raw and organic superfoods available



THE BODY DELI.
fresh superfood skincare



Sea Cucumber Gelee

Formulated with organic aloe vera and cucumber, kale, barley and wheat grass



Chocolate Truffle Body Scrub

Formulated with cacao nibs, cocoa powder, and coca butter



Living Hair Shampoo

Formulated with wheatgrass, oatgrass, nori, and kale juice

YOUTH TO THE PEOPLE'S 3 STEP 'SKIN FOOD' ROUTINE

- › Kale, spinach and green tea hero ingredients
- › Cold pressed extracts
- › 100% vegan
- › Free-from claims (e.g., parabens)

Cleanser



YTTP Youth to the People Age Prevention Cleanser

Serum



YTTP Youth to the People Age Prevention Firm and Brighten Serum

Moisturizer



YTTP Youth to the People Age Prevention Moisture Cream

WHAT'S NEXT



NPD: FACETIME FARMING

Startup SproutsIO is changing the way consumers grow their own food with a soil-free in-home system that is controlled by a smartphone app, allowing for sensor-equipped plants to be cared for remotely



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NPD: BRINGING BACK A CLASSIC

Advancing far beyond the 'astronaut ice-cream' of the 1960s, freeze-drying could be the future of food technology, solving a variety of issues such as food waste and preservation

Startup FoPo is creating food powders from spoiled and ugly fruits and vegetables that are nutrient-rich and shelf-stable



RETAIL: HYPER-LOCAL FOODS

Opening Spring 2016, the first of its kind “mini-farmery” brings locally grown products to an urban setting

The ultimate in ‘local’ ingredients with an environmental-impact close to zero



POWER PLAY

Consumers are facing an energy crisis as the pace of modern life catches up with them. Aware of consumers' need to make long-term lifestyle changes to address falling energy levels, beauty brands are delivering products that put energy claims at the forefront of their message





WHY IS IT IMPORTANT: THE AMERICAS

28%



Tiredness/fatigue is the second most important health concern for US adults (28% agree), just behind weight (39%)¹

62%



Brazilians say that sleep is one of the top 3 factors of a healthy life²

1. Source: Lightspeed GMI/Mintel Base: 2000 US internet users aged 18+; 2. Source: Ipsos Observer Brazil/Mintel Base: 1500 Brazilian adults aged 16+;

WHAT'S NOW



OIL-FREE OPTIONS

Consumers are looking for greener energy sources

Sales of electric vehicles grew 27% in the US from 2013 to 2014

More than 800 cities in 56 countries have bike-share programs with over 1 million bikes



CLEANER PRODUCTS

BPC manufacturers like L'Oréal and P&G are investing in alternative energy sources to create cleaner, less disruptive products and attract consumers

Many brands are using solar and other renewable energies to power facilities and some are purchasing certified renewable energy to offset electricity usage



NEOM CREATES ENERGY BOOSTING BEAUTY WORKOUT

Neom has teamed up with sportswear firm Sweaty Betty to develop the Scent to Power Your Personal Best Collection

The collection comprises Energy Boosting Treatment, Great Day On The Go Mist, Daily De-Stress Bath & Shower Oil and Perfect Night's Sleep Pillow Mist

The treatment should be used before the morning exercise, while the mist is designed for use post-exercise.



SUSTAINED ENERGY RELEASE

NIOD Multi-Molecular Hyaluronic Complex



Advanced serum with 12 forms of hyaluronic compounds in a peptide-charged delivery system.

Enzyme-Reacted Glucosamine Amide HA Pre-Cursor provides rapid reaction to induce fibroblast regeneration, Bio-Yeast HA Pre-Cursor offers moderate term reaction and Novel HA Pre-Cursor Peptide Complex supplies sustained reaction

Dr. Wu Capsule Mask Series Anti-Wrinkle Firming Capsule Mask with Vitamin E



Targets damaged skin with Sustained Release Encapsulation Technology to effectively deliver active ingredients to the skin, including vitamin E acetate and vitamin A palmitate which are said to delay signs of ageing and enhance cellular antioxidant activity

WHAT'S NEXT



INDUSTRY: MENTAL ENERGY

A total wellness approach will combine energy and mindfulness claims to promote a positive approach to physical and emotional image. Brands will offer meditation programmes to help people accept themselves and concentrate on well-being rather than unrealistic ideals of perfection



NPD: ENERGY TEXTURES

Beauty brands will play with textures to link energy benefits with sensorial cues. This will include the very latest developments in immediate and warming textures for slow burn and long burn formulations, as well as sparkling and tingling textures for immediate impact



CROWDFUNDED U°THERMIC COLDSCREEN – ENGAGES CONSUMER BEYOND WHAT THEY CAN SEE



- Rapid **warming** formula (patent pending)
- Quickly supplies moisture to the skin that lasts up to four hours
- Provides permeable barrier to retain heat
- It's 98% natural formula - shea butter, coconut oil, jojoba extracts and aloe

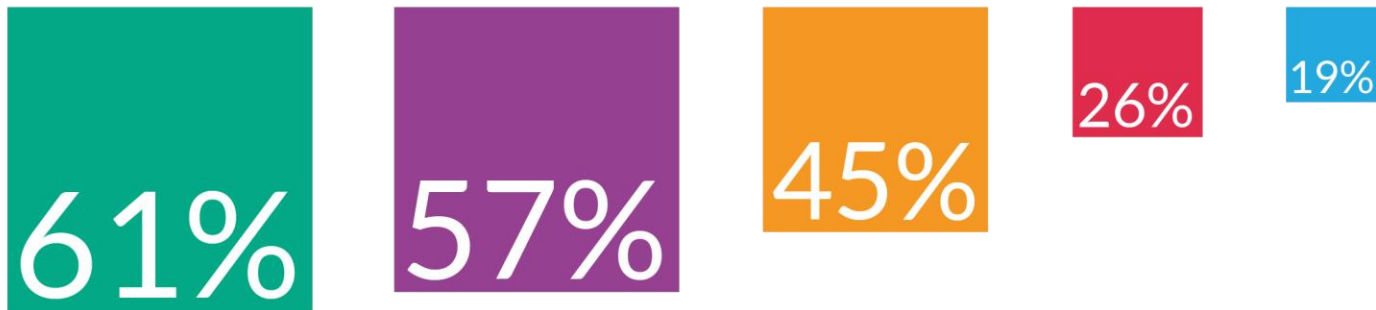
WATER: THE NEW LUXURY

Water is set to become a precious commodity as consumption outstrips supply. The more consumers become aware of this, the more beauty brands will need to change how they manufacture and formulate products to limit their dependence on water.





WHY IS IT IMPORTANT: THE AMERICAS



- US consumers would rather companies worked to improve their business practices to be green than make donations to green organisation^
- US SBS consumers would be interested in products that produce less foam for quicker rinsing*
- Would be interested in no-rinse SBS products*
- Would pay more for biodegradable /environmentally friendly products*
- US women and 13% of US men aged 18-34 use dry shampoo+

Source: Lightspeed GMI/Mintel

Base: ^2000 US internet users aged 18+; *1888 US consumers who use soap, bath & shower products; +311 men and 330 women

WHAT'S NOW



WATER, WATER... NOWHERE

By 2025, **1.8 billion** people will experience absolute water scarcity, and **2/3** of the world will be living under water-stressed conditions



INDUSTRY: CUT THAT CONSUMPTION

Brands like Nike and Adidas are making investments in innovative waterless systems using supercritical CO₂ in the dyeing process



DRY HAIRCARE

Moroccan Oil Dry Shampoo



Ultra-fine rice starches absorb oil, build-up and odor, leaving hair refreshed and volumized
UV-protecting, argan oil-infused formula breaks down instantly, leaving no dull residue

Blow Pro Faux Dry Conditioner



Designed to condition and protect hair pro-longing time between blowouts without washing. Refreshes ends while detangling knots, softening, and giving shine

RINSELESS BEAUTY

Embryolisse Micellar Lotion



Practical and speedy solution for gentle total cleansing and make-up removal for face, eyes, and lips. Product does not require rinsing

Pits & Bits Towel Off Body Wash



Waterless body wash allows for cleansing without water. Simply apply to skin, massage, and wipe dry with a towel

PLANT WATERS

Korean brand Whamisa offers a range of 'water'-free products using botanical extracts instead of traditional purified water



WHAT'S NEXT



NPD: NEW PLANT WATERS

Brands will scour the earth for new plant waters that can be positioned as super-nutritious as well as water-saving. Mainstream superfoods such as artichokes and watermelons will also yield waters for beauty products. Small “shots” of specific waters will also be available to allow consumers to customise their products



INDUSTRY: DRINKING CLOUDS

Equipment captures airborne water from clouds and fog in a process that requires no energy input and avoids depleting groundwater and pollution. Beauty brands will work with environmental agencies to protect the purity of the fog and cloud water they use in their products



RETAIL: DRY SPAS AND SALONS

Waterless and non-rinse products will allow retailers to install dry spas and salons. Tester stations will let consumers try out sheet and peel-off masks for the face and body. Aerated water taps and shower heads will give consumers the sensation of rinsing without the need for water itself



THANKS, GET IN CONTACT



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