

Trends presentations 2006:

trumpeting new benefits



Imogen Matthews

At In-Cosmetics 2006 from April 4 to 6 in Barcelona speakers from leading market research agencies and consultancies discussed key issues and opportunities within the global cosmetics and toiletries markets. In addition to presenting recent developments in emerging markets such as Brazil and Russia, key topics included targeting the special needs of groups such as the over 50s, men, and teenagers, as well as the increasing demand for natural products.

A positive brand experience leads to strong loyalty

In her presentation on the global cosmetics and toiletries markets Euromonitor International's Claire Briney said that in Brazil – one of the world's emerging markets and the fourth largest and fifth fastest growing globally – growth has been fuelled by an extremely young demographic structure, with 60 percent of Brazil's population aged 30 or under. Direct

sales, dominated by local company Natura and global brand Avon, account for 28 percent. Domestic production of natural ingredients is a key feature of the Brazilian market, which has been reaping the benefits of export opportunities.

Hair care is the largest sector worldwide, worth \$ 51 billion, according to Euromonitor. Shampoos is the largest product category, accounting for 29 percent of the total. Briney pointed out the growing importance of salon hair care, which is worth

9 percent of global hair care sales and particularly strong in the US, where 30 percent of sales come from professional hair care brands. Growth factors in global hair care include increased segmentation addressing new consumer "needs", a trend for upscale mass brands and ethnic hair care.

The leading multinationals continue to dominate the world market for cosmetics and toiletries, but with a change at the top, as P&G moved into first position in 2005 thanks to the acquisition of Gillette. L'Oréal Group, at 10 percent compared to P&G's 13 percent of global sales, is expected to



photo: Beiersdorf

claw back share in 2006 following its acquisition of The Body Shop.

The over 50s population in Europe is booming and the most successful beauty companies are those able to meet the needs of this consumer group, maintained Bob Wilmott, director of UK marketing consultancy Diame-tric in his presentation. However, Wilmott was sceptical about using age as a starting point for the marketing of any product because three out of four over-50s say they feel only 75–80 percent of their chronological age. He identified new areas for growth as being anti-tiredness skin care, the launch of smoke protection formulas and a continuing debate between natural beauty and surgi-cal enhancement.

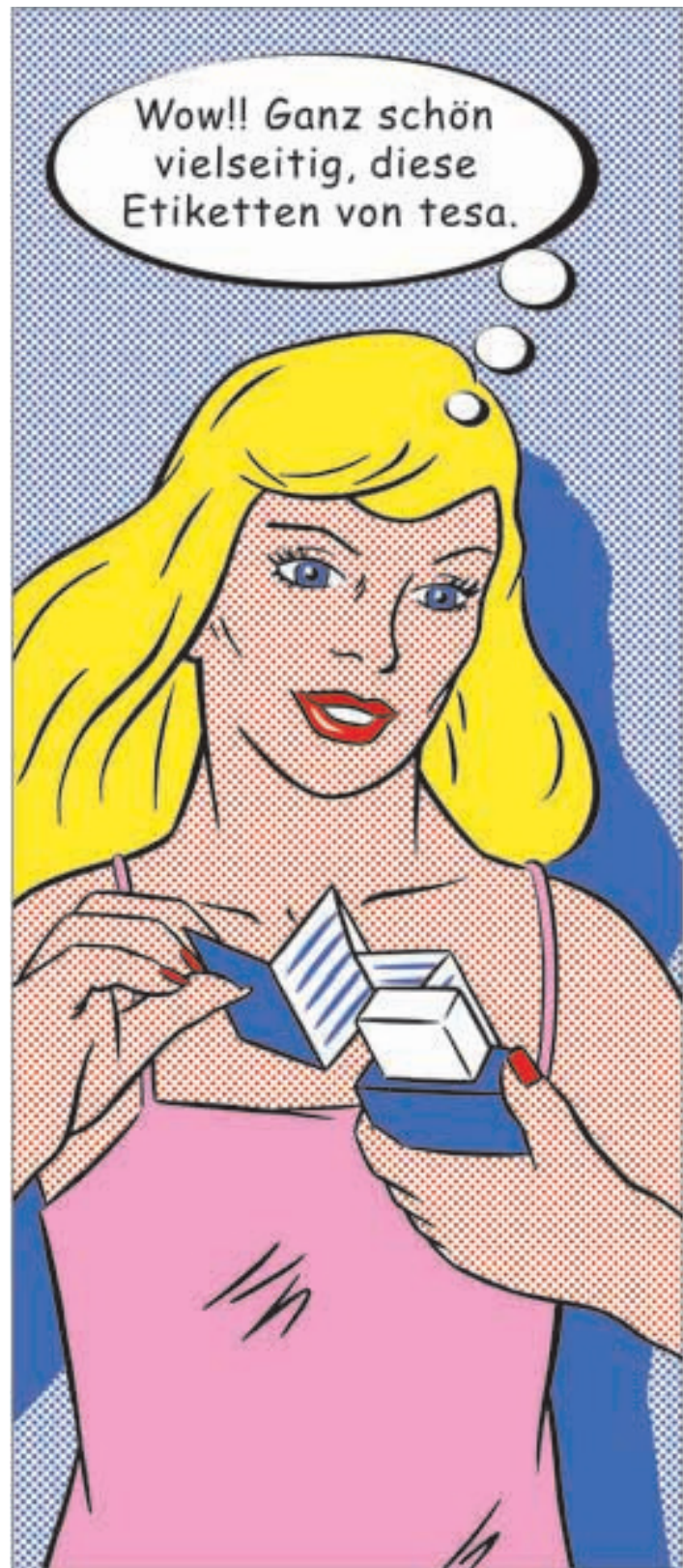
Marie Alix Leroy, from French marketing consultancy Yin Group, looked at the untapped needs of the over-60s who have their own answer to anti-ageing which is diffe-rent from what manufacturers are offering. "At 50 women are still trying to turn back the clock, but at 60 they want to preserve what they have," commented Leroy. Women over 60 prefer pharmacy and low profile brands. Skin dryness is a big issue for this age group, as is skin sensitivity. Leroy provided ideas on how skin care manufacturers could find a simple ingredient and build a story round it that the consumer can remember. Regarding skin dryness, she encour-aged skin care manufactu-rers to educate over-60s to use products more regularly or to combine products for a better moisturising effect.

Daniel Bone, consumer insight analyst for Datamonit- or observed that the personal care consumer is ageing and that by the year 2009 30 percent of European and American consumers will be 50 and over. He stated: "A typical consumer aged 45 and over spends US\$ 45 more per year on such products than a typical consumer aged under 45." He stressed the importance of including older consumers in marketing efforts, providing examples such as Revlon Age Defying Make-up which comes in two formulas, one of which addresses older women's dry skin issues. Focusing on the male consumer, Bone main-tained that he is more complex than is often portrayed and that manufacturers should be aware of three consu- mer types: metrosexual, the most progressive in terms of using grooming products, hybrid traditional who are the largest sector of the market at 60 percent and retro- sexuals who show the least interest in toiletries and grooming. "The important message is that all 3 types of men can be profitably targeted by personal care play- ers by adjusting the marketing mix accordingly," be lieved Bone.

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There has been a major trend towards functional ingredients for cellulite reduction

Jago and Lyn Dornblaser from Mintel said that there has been a major trend in functional ingredients for cellulite reduction, such as Nivea's Goodbye Cellulite Patch containing carnitine, while caffeine, is now being used to a more advanced effect. Natural ingredients are being used in abundance, such as blue lotus and althea root in Nuxe skin care, and cactus flower in Arizona Hot Sands. Royal jelly used in the food industry, is now being used in Helena Rubinstein's newest lipstick, and is said to enhance colour pigments and nourish the lips for six hours. An example of a product that recreates the salon experience at home is Salon Bronze airbrush tanning.

Gillian Morris, industry manager for management consultancy Kline & Company said: "We are seeing innovative raw materials in mass channels," she said, highlighting three product categories which have enabled personal care to improve. Firstly, silicones have been instrumental in enabling new product classes to develop, such as new generation antiperspirants, two-in-one shampoos and skin care,

giving more emollience to textures. Delivery systems now bring huge innovations to anti-ageing skin care, e.g. vitamin C derivatives can now be stabilised and more effective active delivery means improved or enhanced penetration and longer shelf life. Thirdly, speciality actives, such as peptides, are an important trend within anti-ageing skin care. Morris highlighted innovative products such as Strivectin Wrinkle and Stretch Mark cream, Listerine Pocketpaks breath freshener strips and Borba outside and inside beauty products.

Mike Branson, managing partner at UK design consultancy Pearlfisher, explained that there has been a rise in brands offering ethical values, such as The Body Shop and Dr. Hauschka. Estée Lauder Companies, for example, support Breast Cancer Awareness. Another way is to stick to the truth, such as Dove did by using real, not airbrushed, models in its Campaign for Real Beauty.

Euromonitor's Claire Briney cited natural ingredients as one of the key trends in the beauty markets. "The

A life-cycle brand offers products for everyone

Beiersdorf's Nicola Perl explained the research her company undertook before launching its teen skin care range Nivea Young. Perl believes that teens are a difficult group to target. As they move through their teens, these consumers perfect their face care routine and start to buy for themselves, rather than relying on mum to buy for them. The brand relationship happens mainly between 12 and 17, with 80 percent of teenagers having found the right brand. From then on, teenagers tend to stick to their chosen brands. She went on to demonstrate how Nivea is a real life-cycle brand which caters for everyone from babies to seniors.

According to Mintel's statistics between 2004 and 2006 there were 43,758 new launches in cosmetics and 31,836 in skin care worldwide. David

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photo: Biotherm