



FOR HAIR AND SKIN

Fragrances + Botanicals for Solid & Liquid Shampoo & Shower Products



THE ORIGIN OF IMAGINATION

This presentation is fueled by Bell's global Spark trends platform. Made up of five macro trends, it reflects the future of what's to come in the flavour and fragrance industry. It's your guide to what's next and provides the foundation to excite, enliven, and ignite your creativity.

This fragrance concept touches on the macro trend "**Global Consciousness**".

spark[®]
IGNITES CREATIVITY
INSPIRES SENSES

MEET OUR GLOBAL SPARK TRENDS

Sustainability is not just a trend, but a way of life. It's a series of social, economic, and environmental factors that promote a self-sustaining, well-balanced lifestyle. Our **consciousness** towards innovative solutions today could leave everlasting affects for generations to come.

Bell's flavours and fragrances reflect this desire for harmony of humankind and nature.



FINDING SILVER LININGS

Treat Ourselves With Delight



WELL BALANCED

A New Lense Of Optimal Holistic Health



ESCAPISM

New Realities Through The Senses



GLOBAL CONSCIOUSNESS

Pay It Forward To Mother Earth



TOGETHER APART

New Concepts Of Togetherness

A collection of bath and body products is arranged on a light blue wooden surface. The items include a white tray containing a blue bottle, a white tube, a small white bottle with a cork, and a clear spray bottle. There are also several bars of soap in white and peach colors, a round stone with a metal handle, and some green leaves scattered around. The background is a light blue wooden plank wall.

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Shampoo & Shower Products – Solid & Liquid

I. Trend Analysis

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I. TREND ANALYSIS

Shampoo & Shower Products – Solid & Liquid

Solid Shampoo & Shower Products: Trend Evolution from Niche to Mainstream (1/2)

Solid shampoo and shower bars have become a major trend in Europe's personal care industry.

Initially, the trend started in the **natural cosmetics** sector and became a major trend there in **2019**.

Within the same year, in order to keep up with the **sustainability** mega trend, **conventional cosmetic** brands and private labels followed and launched new products in solid format as well.

Solid formats are particularly popular among **environmentally conscious consumers**, since they are usually packed in recyclable paper or cardboard boxes instead of plastic.



Solid Shampoo & Shower Products: Trend Evolution from Niche to Mainstream (2/2)

In **2020**, the trend reached the **mainstream** with large players such as L'Oréal Garnier or Nivea launching shampoo and shower bars.

Besides, **further solid cosmetic applications** appeared on drugstore shelves and in online shops, e.g. conditioner bars, facial cleansing bars or body butter bars.

'Real impact at scale': L'Oréal launches green beauty Garnier solid shampoo bars

By Kacey Culliney

20-Nov-2020 - Last updated on 20-Nov-2020 at 05:01 GMT

BEAUTY / BEAUTY FEATURES

Launch Pad: Five European Solid Shampoo Brands

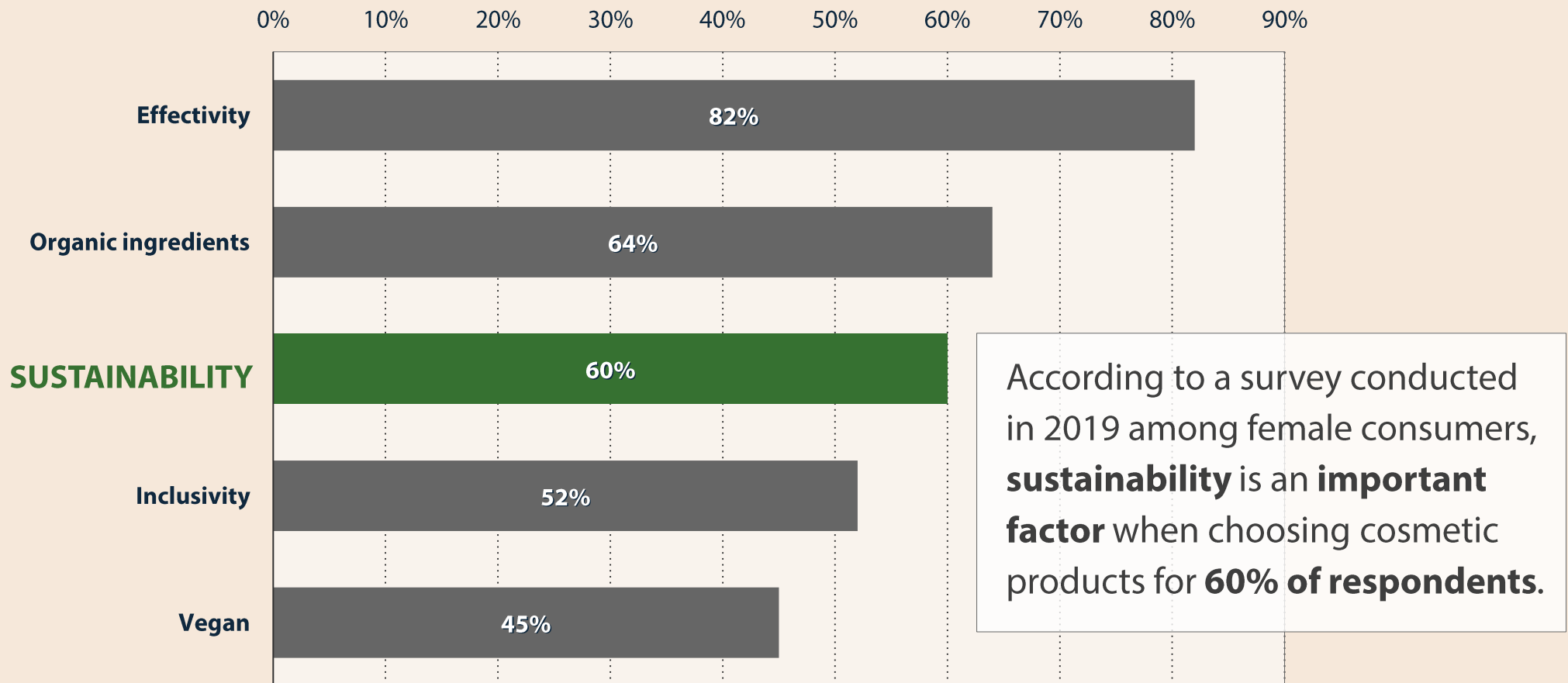
Solid shampoos are surging in popularity in Europe, where sustainably minded consumers are eager for products that use less water and packaging.

By Jennifer Weil on January 24, 2021

ADVERTISEMENT

Sustainability as Purchase Criterion for Cosmetics

Survey Results: Factors important for consumers when purchasing beauty products worldwide (as of 2019)



Shampoo & Shower Bars: Key Advantages



+ **Zero/Less Waste: Goodbye Plastic Packaging**

Compared to liquid products, solid shampoos and shower products do not require plastic packaging. Therefore, they help reduce harmful packaging waste and contribute to protecting the environment.

+ **Space-Saving for Reduced Carbon Footprint**

The relatively small shampoo and shower bars take up less space in transportation and shipment than the classic liquid rinse-off products in bottles. Eventually, this helps reduce CO2 emissions.

+ **Comparably Long Lasting**

Since solid shampoo and shower bars are highly concentrated, they usually last longer than the liquid formats. E.g. one usual shampoo bar is sufficient for up to 80-100 hair washes, which is equivalent to about three 250ml bottles of liquid shampoo.

+ **Leak-Proof and Convenient for Travelling**

The small solid shampoo and shower bars are compact and do not take up much space in travel bags. Since they are waterless, they can be packed in hand luggage on the plane and are leak-proof. A soap bag or tin is recommended for transportation after usage.



II. MARKET EXAMPLES

Shower & Shampoo Bars / Liquid
(Focus on Conventional Products)

Shampoo + Shower Bars: FOAMIE by New Flag

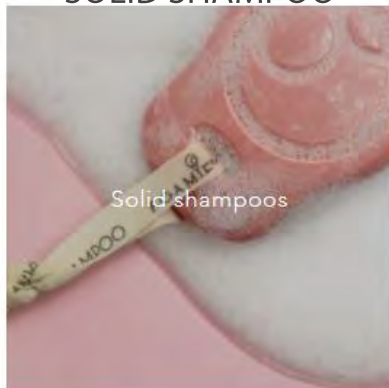
Under the brand name **Foamie**, the German company New Flag is selling entirely solid personal care products.

They started with shampoo and shower bars in **2019** in several countries and then gradually expanded their product range.



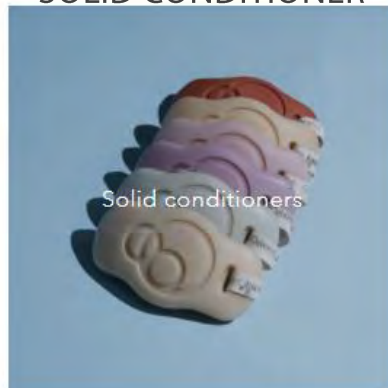
Collections

SOLID SHAMPOO



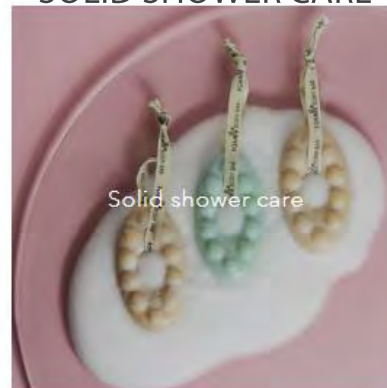
Solid shampoos

SOLID CONDITIONER



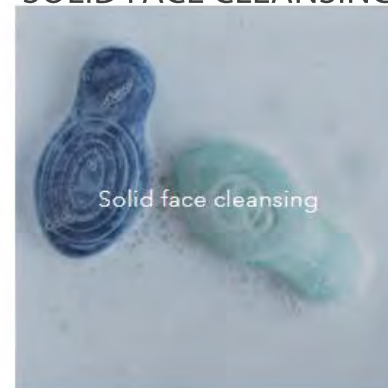
Solid conditioners

SOLID SHOWER CARE



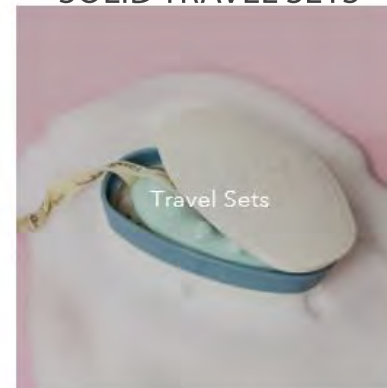
Solid shower care

SOLID FACE CLEANSING



Solid face cleansing

SOLID TRAVEL SETS



Travel Sets

Shampoo + Shower Bars: NATURE BOX by Henkel

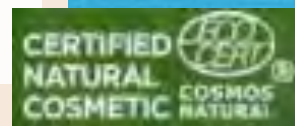


Nature Box started with **conventional** body and hair care products in 2018 in several European countries. End of **2019**, they added shampoo and shower bars to their product line.

In September **2020**, Henkel **relaunched** their whole product range as **certified natural cosmetics** (ECOCERT) – presumably because of the slightly misleading brand name.

PLASTIC SURGERY ON SHAMPOOS? A SOLID IDEA!

Find out why



Shampoo Bars: GARNIER by L'Oréal

SOLID VS. LIQUID



Garnier launched four types of shampoo bars internationally in **2020**, equivalent to its previously established liquid shampoos.

The **solid formulation** of the shampoo bars is made up of **94% plant-based ingredients**.

This product launch is part of L'Oréal's 'for the future' **2030 sustainability program**.

Shampoo Bars: NIVEA by Beiersdorf



In October **2020**, NIVEA launched three conventional **shampoo bars** with the line name “**pH Balance**” in Germany. The solid shampoos are available in the following variants: almond milk (dry hair), coconut milk (regular hair), rice milk (oily hair)

Presumably, the shampoo bars complement Niveas portfolio instead of replace pre-existing products, since Beiersdorf also offers **liquid shampoos** with the claim “ph Balance”.



Solid Personal Care Products: PRIVATE LABEL (Germany)

SOLID SHAMPOO
+ CONDITIONER

BALEA (dm)



rose
scent



vanilla scent

ISANA (Rossmann)



pomegranate
scent



coconut-mango
scent



macadamia-
orange
scent



aloe vera
scent

SOLID SHOWER
+ BODY BUTTER



melon scent
and pome-
granate oil



scent of
pomegranate
and rose



3in1 body, face, hair
(no scent claimed)



scent of
lemon grass
an white tea



3in1 body,
face, hair
maritime-fresh
scent

III. BELL'S FRAGRANCE COLLECTION & BOTANICAL EXTRACTS

for Solid & Liquid Personal Care Applications
with Surfactant Base (Rinse-off)



Our Fragrances for Your Personal Care Products


- ✓ collection of **eight fragrance proposals** for shower and shampoo products
- ✓ all perfume oils are suitable for **solid and liquid** applications with surfactant base
- ✓ broad range of scents for **different target groups**: women / unisex / men
- ✓ **botanical extract recommendations** – two for each fragrance
→ extracts can be added in the end product formulation for claiming

OUR PERFUME OILS ARE:

microplastic free

free from palm oil;
palm oil derivatives are
RSPO certified

vegan



6400203
BELLA BEAUTY

Top: cassis, orange, green notes

Heart: cotton candy, strawberry, jasmine, iris, orange blossom

Base: vanilla, tonka, musk, patchouli, oakmoss





BOTANICAL EXTRACTS

Recommendations

0485437

Botanical Strawberry Gly

FRAGARIA VESCA FRUIT EXTRACT

associated benefits according to CosIng*:
astringent, skin conditioning



0486001

Botanical Vanilla A

VANILLA PLANIFOLIA FRUIT EXTRACT

associated benefits according to CosIng*:
skin conditioning, skin protecting, smoothing





6400200

MAGNOLIA MILK

Top: elegant, pure, cosmetic

Heart: floral, soft, milky, hibiscus, jasmine, magnolia, orchid, lily

Base: woody, warm, sweet, powdery, cedarwood, musk, ambergris





BOTANICAL EXTRACTS

Recommendations

2340270

Botanical Magnolia Blossom A

MICHELIA ALBA FLOWER EXTRACT

associated benefit according to CosIng*:
skin conditioning


0488171

Botanical Hibiscus Gly

HIBISCUS SABDARIFFA FLOWER EXTRACT

associated benefit according to CosIng*:
skin conditioning



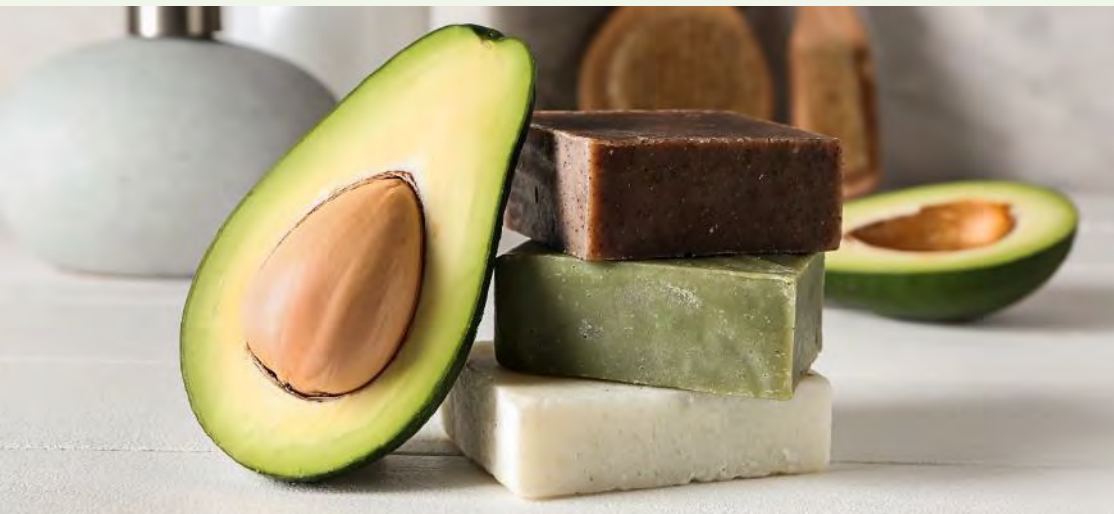


6101544
AVOCADO DREAM

Top: grass, apple, avocado

Heart: aloe, nectarine, cornflower, rose

Base: musk, sandalwood





BOTANICAL EXTRACTS

Recommendations

0487006

Botanical Aloe vera Gly

ALOE BARBADENSIS LEAF EXTRACT

associated benefits according to CosIng*:
emollient, humectant, skin conditioning



0487074

Botanical Avocado A

PERSEA GRATISSIMA FRUIT EXTRACT

associated benefits according to CosIng*:
moisturising, skin conditioning, smoothing, soothing





6101555

TROPIC FLAMINGO

Top: fresh, green, watery, pineapple

Heart: fruity-exotic, floral, pear, peach

Base: creamy, sweet, coconut, cotton candy, clove



BOTANICAL EXTRACTS

Recommendations

0485486

Botanical Pineapple A

ANANAS SATIVUS FRUIT EXTRACT

associated benefit according to CosIng*:
skin conditioning



2340084

Botanical Coconut Gly (org)

COCOS NUCIFERA FRUIT EXTRACT

associated benefits according to CosIng*:
emollient, hair conditioning, skin conditioning





6800375

SUMMER BREEZE

Top: ozonic, green, fresh, water, green apple

Heart: aldehydic, fruity, floral, cosmetic, pomegranate, cyclamen, violet

Base: cosmetic, soft, woody, musk





BOTANICAL EXTRACTS

Recommendations

0485723

Botanical Violet Gly

VIOLA ODORATA LEAF EXTRACT

associated benefit according to CosIng*:
fragrant

0487254

Botanical Apple Gly

PYRUS MALUS FRUIT EXTRACT

associated benefit according to CosIng*:
skin conditioning





6101720

LOTOS LAGOON

Top: fresh, vitalising, watery, grass, watermelon

Heart: floral, cosmetic, lotus, rose, cyclamen, lily of the valley

Base: soft, woody, ambergris, cedar, musk





BOTANICAL EXTRACTS

Recommendations

0488417

Botanical Lotus Gly

NELUMBO NUCIFERA FLOWER EXTRACT

associated benefit according to CosIng*:
skin conditioning

0487378

Botanical Rose Blossom A

PYRUS MALUS FRUIT EXTRACT

associated benefits according to CosIng*:
astringent, skin conditioning, tonic





6101721
WILD ADVENTURE

Top: fresh, watery, maritime, citrus, green, melon

Heart: floral, fruity, herbal, lavender, orange blossom, peach

Base: woody, sweet, amber, musk, cedar, sandalwood





BOTANICAL EXTRACTS

Recommendations

0487875

Botanical Cedar Wood Gly

JUNIPERUS VIRGINIANA WOOD EXTRACT

associated benefit according to CosIng*:
tonic

0485803

Botanical Melon Gly

PYRUS MALUS FRUIT EXTRACT

associated benefit according to CosIng*:
skin conditioning





6101559
WOODY SPLASH

Top: Siberian pine, thyme

Heart: cedar, patchouli, moss

Base: sandalwood, musk, ambergris



BOTANICAL EXTRACTS

Recommendations

2340346

Botanical Pine A (org)

PINUS SYLVESTRIS LEAF EXTRACT

associated benefit according to CosIng*:
tonic

0486638

Botanical Thyme Gly

THYMUS VULGARIS LEAF EXTRACT

associated benefit according to CosIng*:
skin protecting



SOLID APPLICATIONS FOR LESS PACKAGING WASTE.



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