

20 CATEGORY 15 INSIGHT REPORT

Bath, Body & Fragrance



Current trends we see in food and beverage - natural, simplicity, indulgence, environmental responsibility - we see in bath, body and fragrance categories, too. As with food, consumers are looking for honesty, realness and convenience for their on-the-go schedules. In this report, we will take a look into four major personal care categories including Soap & Bath Products, Hair Products, Skincare Products and Fragrance as it relates to beauty.

Soap & Bath Products

Similar to consumer trends in food and drink, soap and bath products are gaining momentum in the areas of simplicity, naturalness and the desire to be green. Now more than ever, consumers are wary about what they are putting on their body, demanding better-for-you products not just at the kitchen table, but in the home and shower as well.

Quench Your Thirst

Many consumers are seeking moisturizing components when making decisions about their bath and shower suds. Interested in products that offer long-lasting moisture, they are actively looking for products with this claim and willing to spend more for them. In 2014, 39% of launches noted formulations that are moisturizing/hydrating. With this claim hitting the Top 10 list within the past

6,096

New products launched.
Jan. 2011 - June 2015.

three years, we can anticipate quenching the skin will remain a feature in bath and shower products forthcoming.

Your Skin Likes Plants Too

Herbal and plant-based ingredients are playing a large role in keeping skin hydrated while offering consumers the naturalness they are looking for. In 2014, 68% of moisturizing products contained botanical ingredients (aloe vera, shea butter, jojoba oil, palm tree butter) and the botanical/herbal claim has increased more than 53% in the past three years.



2,442 soap and bath new products have been launched in the past three years boasting the Botanical/Herbal claim.

Top 10 Claims: Bath & Soap Products January 2011 - June 2015

- Botanical/Herbal
- Ethical - Animal
- Moisturizing/Hydrating
- Anti-Bacterial
- Vitamin/Mineral Fortified
- Paraben Free
- Ethical - Environmentally Friendly Package
- Seasonal
- Female

Soap & Bath Products

Jan. 2011 - June 2015
Products of Note



The Body Shop Vanilla Brûlée Bath Jelly offers indulgent, creamy-smelling bubbles for the ultimate comforting, festive, bath-time experience. This formula features Community Fair Trade honey from the southern region of Ethiopia and boasts softer and smoother skin after use.



Canus Nature Pure Vegetable Soap with Fresh Goat's Milk is made with lavender oil and claims no animal testing on the back of package.



Philosophy Fresh Cream Shampoo, Shower Gel & Bubble Bath is a multitasking three-in-one formula that leaves skin and hair feeling silky soft. It is said to provide a scent that is guaranteed to draw others close yet not overwhelm.



Yes To Coconut Lemongrass Liquid Hand Soap is designed to offer hand renewal benefits, lightly scent the hands and leave them ready for hand-holding. Also available in Grapefruit Basil, Cucumber Eucalyptus and Blueberry Shea.

Hair Products: Shampoo & Conditioner

When it comes to haircare products, the spotlight on plant-based ingredients along with cruelty-free, paraben-free and environmentally friendly claims on packaging, shows a clear focus towards natural, better-for-you products. Consumers are seeking natural formulas, paying attention to vitamin/mineral fortified, antioxidant rich and paraben and sulfate free choices to help care for their hair.

Benefits Over Price

When making decisions about haircare, consumers tend to choose their suds according to specific benefits that they boast, before looking at price. Forty-seven percent of American shampoo users and 52% of Americans who use conditioners choose these products based on benefits such as moisture, smoothing and volume.

All About Appearance

Improving the appearance of hair is a key factor in the shampoo and conditioner market with brightening/illuminating and moisturizing/hydrating of the top claims. Brightening products have recently featured interesting ingredients such as diamond powder, sparkling oil or pink mineral to provide shine.

Squeaky Clean

The largest market sales of soap, shower and bath products is in the U.S. with shower products holding 84% of launches.



4,811

New products launched.
Jan. 2011 - June 2015.

Top 10 Claims: Hair Care Products January 2011 - June 2015

- Botanical/Herbal
- Brightening/Illuminating
- Moisturizing/Hydrating
- Ethical - Animal
- Long-lasting
- Paraben Free
- Time/Speed
- Ethical - Environmentally Friendly Package
- Damaged Hair
- Sulphate/Sulfate Free

Hair Products: Shampoo & Conditioner

Jan. 2011 - June 2015

Products of Note



Valley Green Naturals Rosemary Mint Ultimate Fusion Conditioner is rich in antioxidants and essential fatty acids, exotic marula seed oil and moisturizing emollients to provide hydrated, soft, manageable hair with healthy shine.



Alaffia Coffee & Shea Revitalizing Citrus Mint Shampoo combines coffee, handmade shea butter black soap, soothing aloe and essential oils. Alaffia notes they pay fair wages to member of their shea butter cooperative in Togo, Africa.



Crabtree & Evelyn Tarocco Orange Eucalyptus & Sage Volumizing Conditioner is inspired by the energizing and purifying botanicals of Sicily. This conditioner features Taroccoa Sicilian red orange, eucalyptus and sage, along with a combination of orange, bergamot and neroli to create its scent.



Renpure Advanced BB Cream Coconut Oil Nourishing Shampoo features a fresh coconut fragrance and is said to instantly penetrate to repair damage. This shampoo boasts a cruelty-free claim and is free from sulfates and harsh salts.

Skincare Products

As consumers become more and more alert about what they put into their bodies they are also wary of what they put on their skin. Similar to the soap, bath and haircare categories, skincare products reflect trends of naturalness and health but also have a large focus on time and convenience.

Convenient Care

Consumers are busier than ever before, seeking products with convenience that can deliver instant results and help save time. They are on the hunt for multi-functional products that can cover, protect and moisturize all in one. One way manufacturers have satisfied this demand is with BB, CC and DD creams that are mighty in multi-function and boast several benefits in one. Additionally, several products have become available in smaller packs for on-the-go application.



True Natural Anti-Aging Tan to Go! Self Tan Lotion features a vanilla mandarin scent and retails in a single use 15ml pack to get a glow on-the-go.



9,744
New products launched.
Jan. 2011 - June 2015.

Top 10 Claims: Skincare Products January 2011 - June 2015

- Moisturizing/Hydrating
- Botanical/Herbal
- Ethical - Animal
- Time/Speed
- Vitamin/Mineral/Fortified
- Brightening/Illuminating
- Paraben Free
- Long-Lasting
- Dermatologically Tested
- Cleansing

Skincare Products

Jan. 2011 - June 2015

Products of Note



Pacific Shaving Co. Caffeinated After Shave is claimed to help liven the user's morning . Pacific Shaving Co. is centered around being good for the skin, the wallet and the earth. This formula helps to keep the skin smooth and supple thanks to caffeine.



Deep Steep Coconut Lime Argon Oil Body Butter is said to provide the ultimate hydration. It is formulated to restore moisture in need of intensive repair. This lotion is vegan and cruelty-free.



Bath & Body Works Signature Collection Fresh Brazil Citrus Ultra Shea Body Cream is said to provide 24 hours of continuous nourishing moisture. It is designed to let the senses run wild with a sun-drenched mix of exotic citrus, luscious pineapple, mango nectar, tiare and passionflower.



Bodycology Toasted Vanilla Sugar Exfoliating Sugar Scrub is said to offer rejuvenation that refreshes and softens skin. It features a light fragrance of vanilla and brown sugar and includes avocado oil to hydrate.

Fragrance

When it comes to morning routines, scent can play a large role in why particular products are chosen. Fruits (especially citrus) and herbs like rosemary, mint and lavender have a leg up with consumers because they tend to associate these ingredients with health and freshness.

Aromatherapy

The demand for natural, simple, organic and green to be in all aspects of the consumers' day (including their beauty routine) has helped aromatherapy become mainstream. Manufacturers are promoting scents to achieve everything from enhancing mood and reducing stress to relieving pain and aiding sleep.

Of the U.S. fragrance users, two-thirds would be interested in scents that influence their mood or relieve stress and almost a quarter are willing to pay more for products with these benefits.



Vanilla & Coconut

These beauty and personal care categories (shown at right) share similar top fragrance components. Vanilla is first for soap and skincare and still falls under the top 5 in the hair category. In the past three years, vanilla has shown more than a 50% increase in product launches. Additionally, coconut also stands as a popular fragrance for personal care product launches. Similar to the food and beverage market, both vanilla and coconut are in the top 20 US flavors for new products within the past three years.



Additionally, 25% of consumers would spend more for fragrances with skincare benefits. (This is where we see the lines between traditional beauty products begin to blur.)

Top 10 Fragrance Components: Hair Products January 2011 - June 2015

- Mint
- Citrus
- **Coconut**
- **Vanilla**
- Fresh
- Orange
- Lavender
- Strawberry
- Mango
- Lemon

Top 10 Fragrance Components: Bath & Soap Products January 2011 - June 2015

- **Vanilla**
- Fresh
- Lavender
- Berry
- Citrus
- **Coconut**
- Apple
- Mango
- Lemon
- Flower/Floral

Top 10 Fragrance Components: Skincare Products January 2011 - June 2015

- **Vanilla**
- **Coconut**
- Love
- Fresh
- Lavender
- Pink
- Citrus
- Sweet
- Berry
- Apple

Beauty & Personal Care vs. Food & Beverage

As food and beverage trends overlap with beauty and personal care categories, several market products reflect these blurred lines. Beverage flavors such as green tea and white tea, dessert flavors like bourbon buttercream and citrus flavors like orange all provide scent experience for morning routines that's similar to what's on the kitchen table.



Miss Spa Brighten Jasmine & Green Tea Hand & Body Lotion features an aroma of jasmine and green tea extracts to renew radiance. Other formulas include Coconut Milk & Shea and Pomegranate & Mango.



Korres White Tea Bergamot Freesia Body Milk features a blend of “invigorating, yet sensual, delicate and sweet toned white tea; long-lasting freesia; and sharp, sweet-bitter, heart-warming notes of bergamot.”



Bath & Body Works Bourbon Street Buttercream Gentle Foaming Hand Soap is described as “a decadent salute to the flavors of the New Orleans, such as a warm indulgence of golden butterscotch and whipped vanilla bourbon cream.”



Jafra Spa Brazilian Orange and Ginger Bath and Shower Gel awakens the senses with the scent of Brazilian orange and ginger, and allows users to discover their inner selves by breathing in aromatic essential oils.

FONA CAN HELP!

Let FONA's market insight and research experts translate these trends into product category ideas for your brand. They can help you with concept and flavor pipeline development, ideation, consumer studies and white space analysis to pinpoint opportunities in the market. Our flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. We understand how to mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution. From concept to manufacturing, we're here every step of the way.

CONTACT OUR SALES SERVICE DEPARTMENT at 630.578.8600 to request a flavor sample or visit www.fona.com.

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