

Agenda

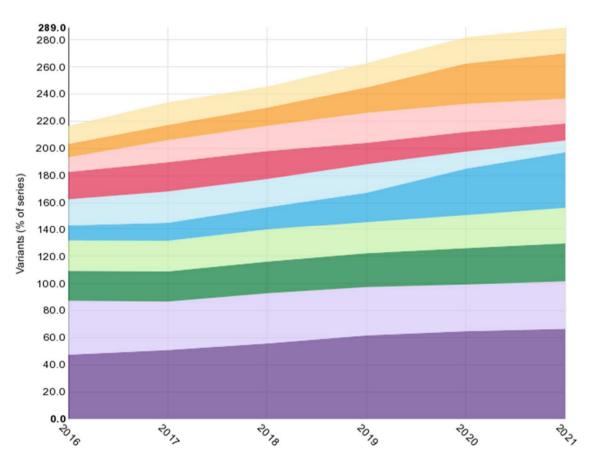
- 1. Hair Care & Styling market overview
- 2. Formulation concepts and key ingredients
- 3. Q&A



Hair Care & Styling market overview

Hair care market analysis

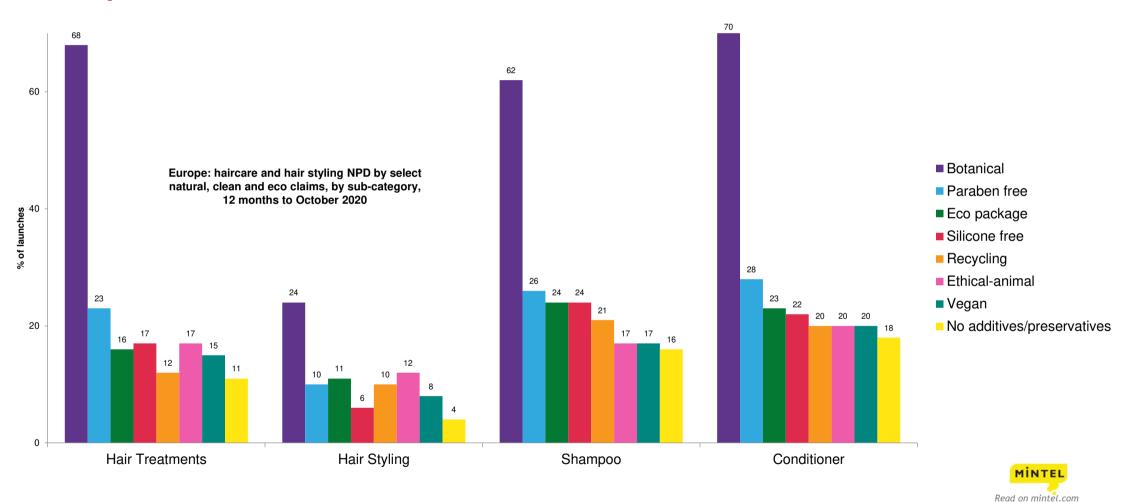




- Botanical/Herbal
- Brightening / Illumina...
- Moisturising / Hydrat...
- Damaged Hair
- Ethical Environmen...
- Paraben Free
- Long-Lasting
- Silicone Free
- Ethical Recycling
- Dermatologically Te...
- where **Region** matches *Europe*
- and Category matches Hair Products
- and Claims matches All Natural Product as the claim

Europe: continue to make inroads in the natural, clean and eco space





Source: Mintel GNPD

Natural, 'clean' and eco styling innovation falls short (vs haircare)



in the UK

51%

of female hair styling product users think it's most important that their hair styling routine is <u>natural</u>

Natural, 'clean' and eco claims may be **fast-growing** in the European hair styling market, but compared to haircare (eg shampoo, conditioner and treatments) there is still **a long way to go.**

Boding well for the segment is consumer interest. The COVID-19 crisis is also likely to have spurred 'clean' and eco movements further given **concerns over pandemic waste and the big emphasis placed on safety and protection.**

'Clean Beauty', Vegan, free from Microplastics (sometimes used in products to improve a formula's thickness or spreadability) are the hottest trends.

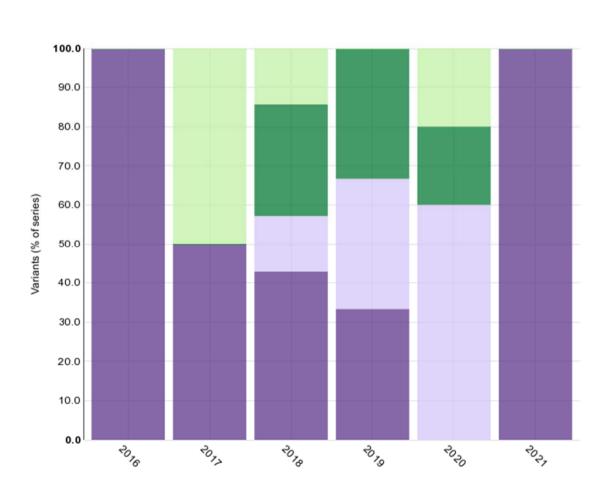
Base: UK: 741 female internet users aged 16+ who use styling products

Source: Lightspeed/Mintel



Hair product Pullulan market analysis





- Hair Styling
- Hair Treatments
- Shampoo
- Conditioner

- where **Region** matches *Europe*
- and Category matches Hair Products
- and Ingredient Search matches Pullulan as the Ingredients



Formulation concepts and key ingredients

Trehalose at a glance

- Water soluble polysaccharide
- Environmentally friendly polymer material
- Easily biodegradable
- Produced from starch by fermentation
- 100% Natural Index according to ISO 16128
- COSMOS approved
- ✓ Powder form
- ✓ Freely soluble in water, does not form gels
- ✓ pH stable from 2 to 11
- ✓ Salt and heat resistant
- ✓ Unique moisturizing
- ✓ Natural protector skin and hair
- ✓ Increases the amount of retained water in Keratin



Trehalose heat styling benefits @ high humidity



Initial Control

Control after 3H

Trehalose after 3H

Initial Trehalose 2%

After 3H @30°C, 80% RH

This striking longevity benefit could only be obtained with Trehalose & heat i.e. switches straightened with hot irons w/o Trehalose treatment didn't show any anti humidity benefit & those straightened with hot irons with **Trehalose has very good anti humidity properties.**

Anti-flaking performance evaluation



In this study, we compare and evaluate styling performances on hair tresses with 2 hair styling gels (PVP @2%) in high humidity conditions (90% RH).

Results





2 hrs



4 hrs



Anti-flaking performance evaluation



Conclusion

after application on hair and making it in curls, with Trehalose:

- ✓ Any residues: flacking reduction effect
- ✓ Curl retention is extended at high humidity
- ✓ Softer and smoother
- ✓ Hair is more rigid

Trehalose avoid PVP flaking

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- ✓ pH stable from 2 to 11
- ✓ Salt and heat resistant
- ✓ Film-forming ability and unique lubricity
- ✓ Binding properties after drying



Natural hair styling

Description

Transparent liquid to give medium fixative at your hair.

Key points

- √ Hard fixative properties and flake-free
- ✓ Quick dry
- ✓ NI = 1; NOI = 1

Key ingredients

PULLULAN:

- ✓ Unique polysaccharide, which can provide smoother texture
- ✓ Film forming
- ✓ Improves adhesion

TREHALOSE:

- ✓ Polysaccharide of glucose
- ✓ High capacity of water retention
- ✓ Trehalose regulate moisture giving longer-lasting benefits to styling
- ✓ Synergy with Pullulan, preventing no residue on the hair





Ingredient		INCI	Supplier	Supplier	
A1	DEIONIZED WATER	AQUA	-	74,00	
A2	PULLULAN	PULLULAN	NAGASE- HAYASHIBARA / DKSH	6,00	
АЗ	ZEMEA PROPANEDIOL	PROPANEDIOL	DUPONT TATE&LYLE / DKSH	3,00	
A4	TREHALOSE	TREHALOSE	NAGASE- HAYASHIBARA / DKSH	2,00	
A 5	ALCOHOL DENAT.	ALCOHOL DENAT.	-	15,00	

Trehalose is efficient to reduce flacking for natural film former like Pullulan

Eyebrow styling gel

Description

Transparent gel for eyebrow with the combination of Pullulan and Trehalose.

Key points

- ✓ Welcare ATBS-C allows an easy application of the product
- ✓ Pullulan and Trehalose combination give a good dry effect, flakefree
- ✓ NI=0,96; NOI= 0.98

Key ingredients Pullulan:

- ✓ Give a good fixing property for water gel
- ✓ Easier application because of a important dry effect
- ✓ Easy to spread on the eyebrow
- ✓ Unique polysaccharide, which can provide smoother texture
- ✓ Film forming
- ✓ Improves adhesion

TREHALOSE:

- ✓ Polysaccharide of glucose
- ✓ High capacity of water retention
- ✓ Trehalose regulate moisture giving longer-lasting benefits to styling
- ✓ Synergy with Pullulan, preventing no residue on the hair





Ingredient		INCI	Supplier	
A1	DEIONIZED WATER	AQUA	-	74,00
A2	PULLULAN	PULLULAN	NAGASE- HAYASHIBARA / DKSH	6,00
A 3	TREHALOSE	TREHALOSE	NAGASE- HAYASHIBARA / DKSH	2,00
A4	WEYLCARE ATBS-C	AMMONIUM POLYACRYLOYLDIMETHYL TAURATE	WEYLCHEM / DKSH	0,90
A 5	1-3 BUTYLENE GLYCOL	BUTYLENE GLYCOL	DAICEL	2,00
В1	EUXYL K 900	BENZYL ALCOHOL (and) ETHYLHEXYLGLYCERIN (and) TOCOPHEROL	SCHULKE/DKSH	0,90





Thank you for your attention

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