

## Solutions for Ethnic Hair Care



# Market Overview

Ethnic consumers are opting for natural hair and are moving away from chemical relaxing treatments

- Requires special care to support healthy hair and maintain good style
- Shampoos, conditioners, and color are expected to grow fastest

Fashion preference for straight hair continues to be strong

- Curl wave segment will continue to decline
- Conditioning and shine important for this trend



# Market Outlook and Opportunities

Some market growth is anticipated

Growth expected from meeting specific consumer needs particularly in the area of coloring and cleansing/conditioning

Curl wave segment is anticipated to decline due to straight hair fashion preference

Product	\$ 2006	\$ 2011	CAGR %
Relaxer	89	93	0.9
Styling	58	58	-
Dresses/ Lotions	51	52	0.4
Coloring	44	50	2.5
Shampoo/ Conditioner	34	39	2.8
Curl Wave Maintenance	15	11	(6.0)
Curl Wave Kits	8	7	(2.6)
Total	299	310	0.7



# Ethnic Consumer Buying Habits

Consumers have more money to spend

- “Black buying power has risen from \$318 billion in 1990, to \$590 billion in 2000, to \$799 billion last year (2007), and will rise to \$1.1 trillion in 2011 – a 237 percent increase in 22 years. “(New America Media, January 2008)

African Americans, of all other ethnic groups, spend more money on hair care than any other ethnic group

- African Americans spend 47% more on personal care products and are less likely to respond to promotional items that may not address their needs (Hunter-Miller Group, Inc.)
- According to their purchase behavior, hair preparations indexed as beauty care’s highest performing categories among African Americans (AC Nielsen)

Consumers of ethnic hair care products have tremendous brand loyalty and rely greatly on product recommendations from their salon stylist



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# Solutions for Ethnic Hair



## Salon Tested for Performance

All samples were salon tested by a trained stylist

- Caroline Brown: 20 years experience, salon stylist and owner of Total Image Salon in Somerset, NJ

All samples were evaluated on African American hair

- Various hair length, texture, and treatments were included in the evaluation
- Samples were evaluated on 22 to 40 clients



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# Cleansing and Conditioning

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# Cleansing and Conditioning of Ethnic Hair

Ethnic hair requires cleansing without stripping of hair's natural oils

- The consumer generally looks for pH balanced shampoo with pH near 5, good lather, and a clean rinsing product
- Delivering manageability and shine are key

Conditioners need to smooth the cuticle, soften the hair, add sheen, and restore moisture

- Hair is damaged by chemical relaxers, stressful styles, and heat appliances
- Although conditioners cannot make hair grow, the ethnic consumers relies on them to reduce shedding and breakage
- Rinse out conditioners and leave in treatments are key product forms



# High Conditioning Shampoo 14585-12K

Trade Name	INCI Name	% w/w
<b>Phase A</b>		
CELQUAT® SC-240C polymer	Polyquaternium-10	0.40%
Deionized Water	Water (Aqua)	31.12%
<b>Phase B</b>		
Deionized Water	Water (Aqua)	31.12%
Monateric CEM-38 (38.8% Active)	Disodium Cocamphodipropionate	5.15%
Cola Carb TDC (91% Active)	Trideceth-7 Carboxylic Acid	2.20%
Standapol A (28.5% Active)	Ammonium Lauryl Sulfate	28.07%
<b>Phase C</b>		
RITA EGMS	Glycol Stearate	1.00%
<b>Phase D</b>		
Versene 100	Tetrasodium ETDA	0.44%
Glydant Plus	DMDM Hydantoin (and) Iodopropynyl Butylcarbamate	0.50%
<b>Phase E</b>		
Citric Acid	Citric Acid	QS
Sodium Chloride	Sodium Chloride	QS
<b>Total:</b>		<b>100.00%</b>



## CELQUAT® SC-240C Polymer

INCI Designation: Polyquaternium-10

Recommended for rinse off systems containing surfactants

- Surfactant compatible
- High cationic charge makes it substantive to hair
- Cellulose backbone improves combability of hair and imparts a smooth feel

CELQUAT SC-230M polymer can also be used

- Higher viscosity grade
- Similar features and benefits as above



# Experience in the Salon



# Hair Conditioning Mask\* 14585-6E

Trade Name	INCI Name	% w/w
<b>Phase A</b>		
Crodacol CS-50	Cetearyl Alcohol	4.00%
Cetiol SB-45	Shea Butter, partially hydrogenated	3.00%
Drakeol 35	Mineral Oil	3.00%
<b>Phase B</b>		
Deionized Water	Water (Aqua)	82.15%
<b>CELQUAT® L-200 polymer</b>	Polyquaternium-4	0.30%
<b>STRUCTURE® ZEA starch</b>	Hydroxypropyl Starch Phosphate	2.00%
<b>Phase C</b>		
Dow Corning 1501 Fluid	Cyclomethicone (and) Dimethiconol	2.00%
<b>Phase D</b>		
Dow Corning 949	Amodimethicone (and) Cetrimonium Chloride (and) Trideceth-12	2.00%
Glycerin	Glycerin	2.50%
Ritapan DL	Panthenol	0.30%
Glydant Plus Liquid	DMDM Hydantoin (and) Iodopropynyl Butylcarbamate	0.75%
<b>Total:</b>		<b>100.00%</b>

Can be used as a regular conditioner or as a deep conditioning treatment

- For deep conditioning leave in for 5 -10 minutes

\*Rinse out product form



# STRUCTURE<sup>®</sup> ZEA Starch

INCI Designation: Hydroxypropyl Starch Phosphate

Cold water processable starch product providing

- Emulsion stabilization
- Formulation texture options
- Improved formulation aesthetics
  - Reduces oily feel in some formulations
  - Reduces stickiness and tackiness of formulations

Product features

- Salt tolerant
- Compatible with a wide range of ingredients
- Shear thinning
- Naturally derived



## CELQUAT<sup>®</sup> L-200 polymer

INCI Designation: Polyquaternium-4

Recommended for low/ no surfactant systems

- Ideal for conditioners, foams and styling aids
- High cationic charge makes it substantive to hair
- Cellulose backbone improves combability of hair and imparts a smooth feel
- Lower molecular weight polymer prevents excessive buildup
- Provides excellent high humidity curl retention and anti-frizz properties



# Conditioning Foam Wrap 14585-7

Trade Name	INCI Name	% w/w
<b>Phase A</b>		
<b>CELQUAT® L-200 polymer</b>	Polyquaternium-4	1.00%
Tego Betain L7 OK (30%)	Cocoamidopropyl Betaine	0.50%
Tween® 20	Polysorbate 20	0.50%
Glydant Plus Liquid	DMDM Hydantoin	0.50%
Deionized Water	Water (Aqua)	97.50%
	<b>Total:</b>	<b>100.00%</b>

Can be used as a styling mousse product when drying with a blow dryer or as a wrap product for more intense styling and longer hold



# Experience in the Salon



# Wearable Hair Treatment\* 14585-14A

Trade Name	INCI Name	% w/w
<b>Phase A</b>		
CELQUAT® SC-230M polymer	Polyquaternium-10	0.50%
AMAZE® starch	Corn Starch Modified	0.50%
STRUCTURE® ZEA starch	Hydroxypropyl Starch Phosphate	1.00%
Versene 100	Tetrasodium EDTA	0.15%
Deionized Water	Water (Aqua)	79.75%
<b>Phase B</b>		
Glycerin	Glycerin	2.50%
Crodacol C-70	Cetyl Alcohol	2.00%
Promulgen D	Cetearyl Alcohol (and) Ceteareth 20	2.00%
Incroquat S-85	Stearalkonium Chloride	2.00%
Crodacol S-95 NF	Stearyl Alcohol	1.75%
DC 556 Cosmetic Grade Fluid	Phenyl Trimethicone	0.50%
DC 200, 1000 cst	Dimethicone	0.25%
<b>Phase C</b>		
Deionized Water	Water (Aqua)	5.00%
dl-Panthenol	Panthenol	0.25%
<b>Phase D</b>		
Hydrosoy 2000	Hydrolyzed Soy Protein	0.50%
Cropeptide W	Hydrolyzed Wheat Protein (and) Hydrolyzed Wheat Starch	0.50%
Phenonip	Phenoxyethanol (and) Ethylparaben (and) Butylparaben (and) Propylparaben (and) Isobutylparaben	0.85%
<b>Total:</b>		<b>100.00%</b>

\*Leave in treatment



## AMAZE<sup>®</sup> starch

INCI Designation: Corn Starch Modified

Unique, natural-based, nonionic polymer

- Non-tacky film offers touchable hold
- Excellent humidity resistance
- Excellent volume building properties
- Restylable
- Cost effective



# Experience in the Salon



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# Styling and Finishing

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## Styling of Ethnic Hair

Many product types are used to prepare and style ethnic hair

Hair is conditioned and smoothed with wrap products

- Consumers want these products to provide quick drying without a residual dulling film on the hair
- Products that provide body for smooth styles are particularly important

Hair cream and pomade products are used to smooth the cuticle and to add shine

- These products must be light weight and non-greasy for use on a variety of hair textures

Sprays are used to prepare the hair for styling as well as finishing

- Thermal sprays must deliver protection as well as hold to the hair
- Finishing sprays need to control split ends and frizz and provide weightless hold



# Low VOC Thermal Styling Spritz 14585-8

Trade Name	INCI Name	% w/w
<b>Phase A</b>		
SD Alcohol 40-2	SD Alcohol 40-2	20.00%
Deionized Water	Water (Aqua)	74.25%
<b>FLEXAN II polymer</b>	Sodium Polystyrene Sulfonate	4.50%
Dow Corning 193	PEG-12 Dimethicone	0.60%
Super Solan	PEG-75 Lanolin	0.50%
Ritapan DL	Panthenol	0.15%
	<b>Total:</b>	<b>100.00%</b>



## FLEXAN<sup>®</sup> II Polymer

INCI Designation: Sodium Polystyrene Sulfonate

Proprietary technology to AkzoNobel used in styling and thermal protection products

Highly charged anionic polymer

- Forms strong, flexible films that contract upon drying wrapping the hair in polymer film
- Thermally stable to ~ 300°C
- Complexes with cationic polymers to remove build-up
- Dissipates static and reduces frizz



## Experience in the Salon



# Wax Pomade 12274-51B-2

Trade Name	INCI Name	% w/w
<b>Phase A</b>		
Drakeol 7	Mineral Oil	11.00%
Arlasolve 200	Isoceteth-20	20.00%
Brij 93	Oleth-2	6.00%
<b>Phase B</b>		
Deionized Water	Water (Aqua)	48.95%
<b>DynamX<sup>®</sup> polymer</b>	Polyurethane-14 (and) AMP-Acrylates Copolymer	5.00%
PVP K-90	PVP	1.00%
<b>FLEXAN<sup>®</sup> II polymer</b>	Sodium Polystyrene Sulfonate	1.00%
Propylene Glycol	Propylene Glycol	5.00%
Sorbitol	Sorbitol	1.00%
Uvinul MS-40	Benzophenone-4	0.01%
Aloe Vera Gel	Aloe Barbadensis Gel	0.01%
Duochrome BG 826C	Mica (and) Titanium Dioxide (and) Ferrocyanide	0.10%
FD&C Blue #1 (0.1% aq. Soln.)	FD&C Blue #1	0.10%
Glydant	DMDM Hydantoin	0.83%
<b>Total:</b>		<b>100.00%</b>



## DynamX<sup>®</sup> polymer

INCI Designation: Polyurethane-14 (and) AMP-Acrylates Copolymer

Flexible polymer film provides

- Durable, long lasting hold
- High gloss
- Style memory
- Curl definition
- Anti-frizz properties

When used in hair spray, formulations with DynamX polymer are

- Low tack and fast drying
- Crystal clear, low viscosity solutions



## Experience in the Salon



# Humidity Resistant Mist 14585-5

Trade Name	INCI Name	% w/w
<b>Phase A</b>		
SD Alcohol 40	SD Alcohol 40	55.00%
Deionized Water	Water (Aqua)	4.88%
AMP-95	1-Amino-2-Methyl-1-Propanol	0.90%
<b>AMPHOMER® LV-71 polymer</b>	Octylacrylamide/Acrylates/ Butylaminoethyl Methacrylate Copolymer	4.00%
Uvinul MS 40	Benzophenone-4	0.05%
Ritapan DL	Panthenol	0.01%
Cropeptide W	Hydrolyzed Wheat Protein (and) Hydrolyzed Wheat Starch	0.01%
<b>Phase B</b>		
Propellant 152A	Hydrofluorocarbon 152A	35.15%
<b>Total:</b>		<b>100.00%</b>



## AMPHOMER® LV-71 polymer

INCI Designation: Octylacrylamide / Acrylates /  
Butylaminoethyl Methacrylate Copolymer

Styling polymer for spray applications

- Excellent film former provides
  - Exceptional stiffness
  - High humidity curl retention
- Good propellant compatibility
  - Can be used in both anhydrous and alcohol free systems



## Experience in the Salon



## Wrap Up

### Trends in ethnic hair

- Sleek, straight styles
- Natural looking and feeling hair
  - No residue or build up
- Healthy, conditioned hair

### Ethnic Consumer buying power

- Strong brand loyalty
- Salon recommendations drive consumer buying behavior
- Greatest spend on hair care of all other ethnic groups

Products that deliver performance with good economic value will win with this consumer



# AkzoNobel Polymers for Ethnic Hair Care

	<b>Performance Attribute</b>	<b>Use Level</b>	<b>Application Recommendation</b>
<b>CELQUAT® SC-240C/ SC-230M polymer</b>	Conditioning/ cleansing	0.1 – 0.5%	Shampoos, conditioners
<b>STRUCTURE® ZEA starch</b>	Viscosity builder, aesthetic enhancer	1.0 – 3.0%	Hair creams, conditioners
<b>CELQUAT® L-200 polymer</b>	Styling Conditioning	0.5 – 3.0% 0.1 – 0.5%	Mousses, leave-in and rinse off conditioners
<b>AMAZE® starch</b>	Styling, humidity resistance	0.5 – 5.0%	Hair creams, gels, mousses
<b>FLEXAN® II polymer</b>	Styling/thermal protection	3.0 – 7.0%	Styling spritzes, pomades, cream and lotions
<b>AMPHOMER® LV-71 polymer</b>	Styling	2.0 – 7.0%	Aerosol and non-aerosol sprays, and pomades
<b>DynamX® polymer</b>	Style memory, film formation	3.0 – 18.0 % (spray) 1.0 – 10.0% (styling aids)	Pomades, gels, aerosol and non-aerosol sprays



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