

Global Trends To Watch in Baby Care

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Agenda

- About Datamonitor Consumer 公司介绍
- Brief market context 市场概览
- Purer and safer formulations 更纯净更安全的配方
- Conveniently versatile 便利多样化
- Brand identity and packaging 品牌标识和包装
- Specialized and fusion products 专业化和融合产品
- Q&A 问题



Datamonitor 公司背景

DATAMONITOR 自从1985年起一直在消费品市场上提供高价值的信息和咨询服务, 是一家在市场分析服务中富有世界权威性的中立咨询顾问公司.

过去,我们积极收购和合并有素质的咨询公司, 好让我们能更加有效地提升数据库的内容,为众多世界知名的快消品牌公司服务, 更具前瞻性地解决他们业务,产品和市场的问题.

2007: 正式被在英国伦敦上市(LSE:INF) **Informa Group** 全面收购成功, 有了市值21亿英镑的综合性信息公司作为背后的强大的财务和资源上的支持. 我们更加积极的提升平台内容.

2009: 收购包装创新平台 – **PackTrack**, 并成功于2012年把它整体融入**KnowledgeCentre** 资料库

2010: 收购其中一家市场上的其中一家竞争对手 - **Business Insights**, 他们是以与整个欧洲, 美国, 亚太, 联营公司和专家网络为基础的信息研究公司,内里的分析师, 联营公司和专家网络来自于快销品牌和顾问的背景。

2011-2012: **Business Insight** 也将会和**PackTrack** 一样, 整体融合到**KnowledgeCentre** 资料库当中, 更容易的从产品类别洞察, 创意概念, 技术和产品的未来发展趋势等, 通过智能系统简单扼要演示出来!



Market context 市场情况

Defined by two core categories experiencing broadly similar growth

	Overall growth 2000-2016	CAGR 2000-16
Baby personal care overall	72%	3%
Diapers	71%	3%
Baby	71%	3%
Training	68%	3%
Cloth	74%	4%
Baby Toiletries	80%	4%
Wipes	84%	4%
Bath	65%	3%
<i>Liquid based</i>	64%	3%
<i>Solid based</i>	67%	3%
Lotion	74%	4%
Oil	84%	4%
Shampoo	87%	4%
Powder	42%	2%

Top 3 fastest growing
markets



印尼



中国



南非

Source: Datamonitor analysis



About Datamonitor Consumer 关于我们

Consumer and innovation experts



Consumer Insight 消费者洞察
Real insight on real consumers



Innovation Tracking 创新跟踪
Uncover new trends in products and packaging



Market Assessment 市场评估
Identify new hot spots in the marketplace



Future Technologies and Strategies
Understand what shapes tomorrow
未来的技术和策略



Purer and safer formulations 更纯净更安全的配方

Deconstructing the theme



WHAT?

- Parents asking a lot more questions about formulation integrity
- Reading the ingredients more thoroughly
- Desiring products that are truly chemical-free options



WHY?

- Parental concern about baby's exposure to harmful chemicals
- Baby's skin is delicate and needs special care
- "Healthy halo" of products that are as close to nature as possible



HOW?

- Baby care as a gateway category for natural personal care products
- Making parents feel secure and confident: free-from chemicals
- Formulated with the fewest ingredients possible
- Connecting ethically/environmental benefits to core product composition



Purer and safer formulations 更纯净更安全的配方

It is *THE* preeminent theme in baby care innovation

TOP 10 PRODUCT CLAIMS FOR BABY PERSONAL CARE , 2012-13

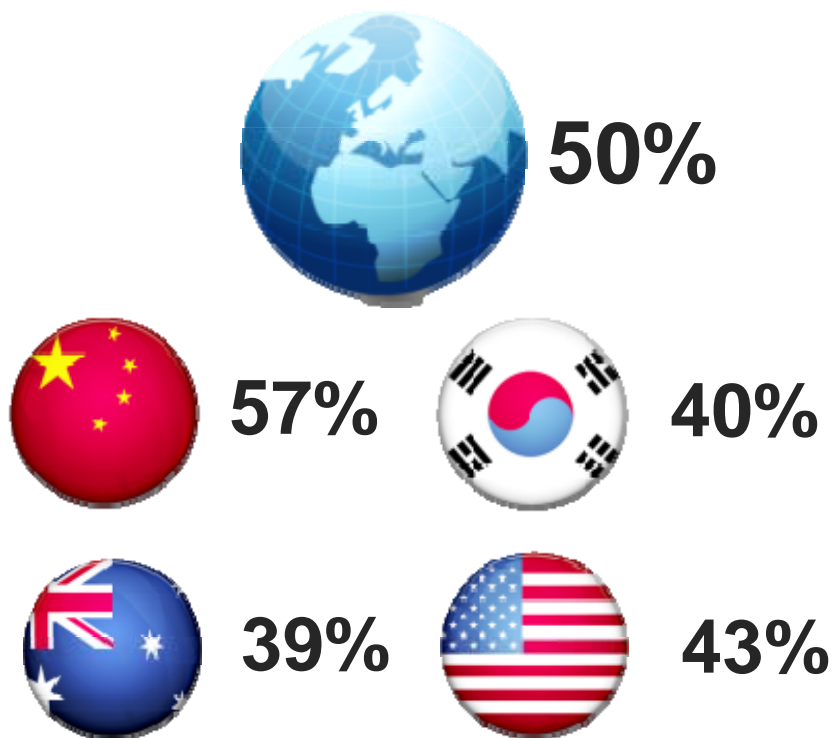
NORTH AMERICA 北美	EUROPE 欧洲	ASIA-PACIFIC 亚洲	GLOBAL 全球
No Paraben 不含苯	No Paraben 不含苯	Natural 自然	No Alcohol 无酒精
Natural 自然	Organic 有机	No Alcohol 无酒精	Natural 自然
No Allergy 无过敏	No Artificial Color 无人工色素	Licensed 持牌	No Paraben 不含苯
No Fragrance 无香味	No Alcohol 无酒精	No Fragrance 无香味	Organic 有机
Organic 有机	Natural 自然	Organic 有机	No Fragrance 无香味
High Vitamins 高维生素	No Perfumes 无香料	Sensitive Skin 敏感肌肤	Sensitive Skin 敏感肌肤
Sensitive Skin 敏感肌肤	Sensitive Skin 敏感肌肤	Anti-Bacterial 防细菌	No Allergy 无过敏
No Gluten 无麸质	No Fragrance 无香味	High Vitamins 高维生素	No Artificial Color 无人工色素
No Animal 没有动物成分	No Preservatives 无防腐剂	No Paraben 不含苯	High Vitamins 高维生素
No Alcohol 无酒精	Environmentally-Friendly 环保	No Artificial Color 无人工色素	Licensed 持牌



Purer and safer formulations 更纯净更安全的配方

Parents are highly concerned about the impact of chemicals on children's health

VERY CONCERNED about the impact of chemicals used in consumer products on your children's health...



Source: Datamonitor Consumer Survey

! read the LABEL

Get to know the chemical ingredients to avoid in your everyday products. Their effects go deeper and last longer than you think.

"Petroleum-based ingredients [e.g. propylene glycol, PEGs, isopropyl alcohol] pose risks of cancer, genetic damage and reproductive toxicity including infertility, to unsuspecting consumers and their infants and children"
-Dr. Samuel S. Epstein, M.D., Chairman of The Cancer Prevention Coalition

HARMFUL CHEMICAL	WHAT IT DOES TO YOU	NATURAL ALTERNATIVE
SURFACTANTS SLS/SLES (sodium lauryl sulfate/sodium laureth sulfate), ALS/ALES (ammonium lauryl sulfate / ammonium laureth sulfate) damages skin allowing ready penetration of carcinogens sodium cocoyl isethionate (coconut oil derived), decyl glucoside (coconut derived)	PRESERVATIVES parabens, BHA/BHT, DMDM hydantoin, phenoxethanol, TEA (triethanolamine) may cause cancer & tumors, weakens immune system, allergenic & irritant, premature aging rosemary essential oil, gluconolactone (from corn), glyceryl caprylate (coco, palm and glycerin derived)	
FRAGRANCE synthetic parfum, phthalates damage to liver & reproductive organs, essential oils, natural fragrance oils	MOISTURIZERS mineral oil, dimethicone, petrolatum, paraffin coats skin like plastic & clogs pores, slows down skin function & cell development, speeds up skin ageing cocoa butter, virgin coconut oil, sunflower oil, avocado oil, passion fruit oil, castor oil	
ANTI-BACTERIAL triclosan endocrinal and reproductive malfunctions acapulco extract, sugarcane alcohol, chitosan	COLORANTS lake dyes, FD&C colors, carmine (a natural colorant in lipsticks but made from crushed cochineal insects) neurotoxic, possible carcinogen mineral iron oxides	
EMULSIFIERS DEA (diethanolamine) affects hormones stearyl alcohol, cetyl alcohol (all vegetable derived)	BUG REPELLENT ACTIVE DEET promotes degenerative diseases, congenital diseases citronella, lemongrass, lavender and rosemary essential oils	
SOLVENT propylene glycol damage to liver and kidney vegetable glycerin, water		

Learn more about the ingredients to avoid in your personal care and beauty products at www.ewg.org/skindeep. The Environmental Working Group is a U.S. non-profit group dedicated to protecting consumers from health problems attributed to harmful chemicals in everyday products.



Purer and safer formulations 更纯净更安全的配方

Natural/organic claims hold considerable appeal in general. Even more so for baby products

High' or 'very high' amount of influence on personal care choices

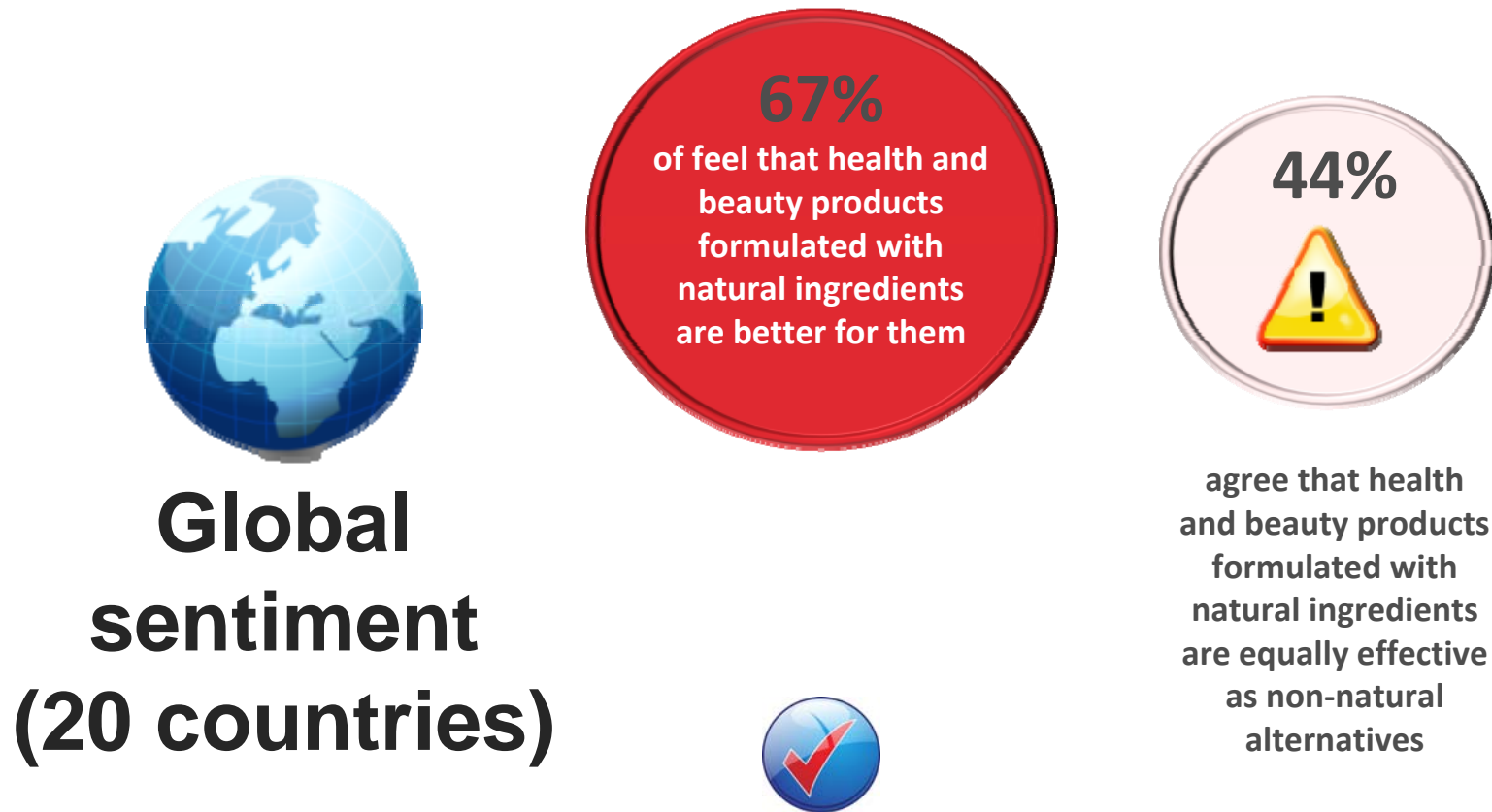


Social media has helped consumers find the best products meeting this more virtuous formulation criteria



Purer and safer formulations 更纯净更安全的配方

Beware the gaps between the “healthy halo” versus perceived performance limitations



Source: Datamonitor Consumer Survey



Purer and safer formulations 更纯净更安全的配方

Burt's Bees brand uses baby care as a “gateway category.” It is selling direct to consumers



Burt Bees natural baby care range was a brand extension in 2013. A new ecommerce site, burtsbeesbaby.com, is the company's first direct-to-consumer channel



Purer and safer formulations 更纯净更安全的配方

Key benefit messages are: safe, effective, natural and paediatrician tested



Burt Bees natural baby care products are free of synthetic fragrances, sulfates and parabens. The brand is underpinned by gentle yet effective natural ingredients

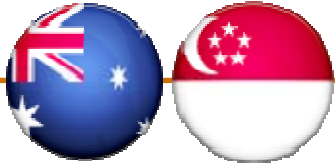
Burt Bees natural baby care products 合成香料，硫酸盐和对羟基苯甲酸酯。

该品牌的支持温和而有效的天然成分



Purer and safer formulations 更纯净更安全的配方

Using organic ingredients – or fewer ingredients – for added assurance



Gaia Natural Baby combine natural and certified organic oils and extracts

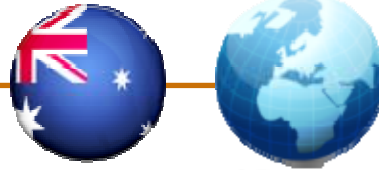


Lavender Baby Powder is certified organic and has just two ingredients



Purer and safer formulations 更纯净更安全的配方

For some parents, a new sense of legacy comes with a child being a central part of their lives



Labeled Good
Environmental Choice By:
SWEDISH SOCIETY FOR
NATURE CONSERVATION
MEMBER OF THE WORLD
CONSERVATION UNION



Naty by Nature Babycare's growth in Australia (25%) reflects an increasing number of new parents who have a genuine desire to select products that are ethical and ecologically sustainable, as well and sensitively formulated



Conveniently versatile 便利多样化

Deconstructing the theme



WHAT?

- 'Selling time,' and making lives easier is core to effective parent targeting
- Busy on-the-go parents appreciate solutions that make their lives simpler



WHY?

- Convenience attributes represent a consumer coping strategy
- Products consumed/applied in less conventional occasions and locations
- Higher demand exists for portable products



HOW?

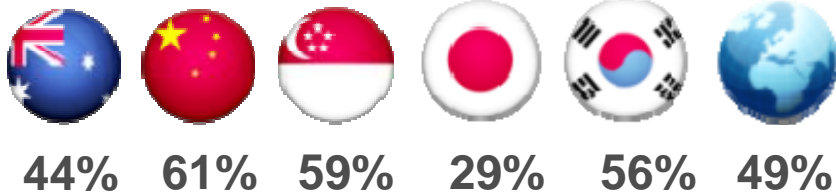
- Convenient and practical packaging
- Portable products
- Simplifying the buying process and volume of products



Conveniently versatile 便利多样化

A perception of time scarcity means we gravitate to easy and simple solutions

It is difficult to manage my daily obligations and find time to relax



Type of convenience	Timing of convenience
Saving time	Deciding
Saving physical energy	Purchasing
Saving mental energy	Preparation
	Consumption
	Post-consumption

THERE IS
BEAUTY IN
SIMPLICITY

Source: Datamonitor analysis; Datamonitor Consumer Survey



Conveniently versatile 便利多样化

Conveniently packaged products to suit a busy, mobile and on-the-go parental population



Asda Little Angels combines baby
wipes and nappy cream
结合婴儿湿巾和护臀霜



**Coppertone Water Babies -
Sunscreen Lotion** has a clip for ease
of carrying
防晒露有一个夹子，便于携带

Source: Datamonitor's Pack-Track

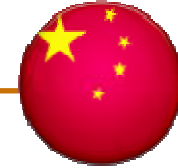


Conveniently versatile便利多样化

Multi-functional simplicity and ease of application/usage



Baby Mantra - 3-in-1 Bubble Bath Shampoo & Wash is multi-functional to help simplify product choice 是多功能的, 以帮助简化产品选择

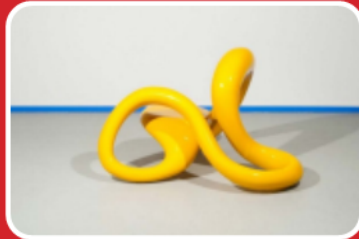


Tesco Baby Moisturizing Cream is "easy to be absorbed" and is suitable to be applied on face and body “容易被吸收”和 适合应用于脸部和身体



Brand identity and packaging 品牌标识和包装

Deconstructing the theme



WHAT?

- A wealth of creative packaging executions
- Depicting messages of health, love and support
- Desiring products that are truly chemical-free options



WHY?

- Pack designs help shoppers to navigate the category
- Creating a distinct visual brand identity for optimal shelf impact
- Reflect on the outside what's contained on the inside



HOW?

- Brand language: cute names and childish words, rounded fonts
- A backdrop of soft pastel colors to reflect gentle formulations
- Proprietary bottle shapes that reinforce a gentle brand identity



Brand identity and packaging 品牌标识和包装

Package design reflects the tone, image, and personality of the product/brand



Penaten Baby has a soft touch surface finish evocative of soft baby skin and gentle formulation
具有柔软触感的表面, 光洁度唤起软婴儿皮肤和温和配方的感觉



Biotropic Bebe Natureza uses simple, fun graphics and soft pastel colours create a friendly brand persona
使用简单, 有趣的图形和柔和的色彩创造一个友好的品牌人物



Brand identity and packaging 品牌标识和包装

Package design reflects the tone, image, and personality of the product/brand



method ensures that its baby and kids skin care ranges stand out with bottles shaped like penguins
确保其婴儿和儿童的皮肤护理范围像企鹅使它脱颖而出瓶形状

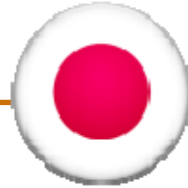


Treasures - Ultra Absorbent Nappies
provides interactive value by converting into a toy
提供交互式的价值转换成玩具!



Brand identity and packaging 品牌标识和包装

Themed/character packaging



Bath Roman was spotted by Pack-Track in 2008 in Japan. The intense pink color and cute shape are very eye-catching. Refill pouch also available



Specialized and fusion products 专业化和融合产品

Deconstructing the theme



WHAT?

- More specialized products for babies – e.g. fragrances and balms
- A recognition of developmental changes outside of diapers



WHY?

- Baby care is a high emotional involvement category creating a wealth of opportunities across product formats
- Parents looking for the best performing products – unwilling to compromise on quality (including trusted brands)



HOW?

- Products that dual target – i.e. positioned at adults as well
- Adult-themed products appropriated for babies
- Replicating the diaper approach: targeting different personal care needs during a baby's development



Specialized and fusion products 专业化和融合产品

Baby products for adults, and adult-orientated product categories appropriated for babies



Mixa Baby - Gel for Body & Hair is
"ideal for frequent washing for
adults with sensitive skin"
“皮肤敏感的成年人
经常洗用的理想产品”



Le Bebe Coo - Baby Lipstick takes a
more grown-up approach (i.e. adult
cues) with pack-design
包装设计（儿童产品成人化）



Specialized and fusion products 专业化和融合产品

In the last year or so several baby perfumes have merged, moving from mass to prestige



Johnson & Johnson Baby Cologne is
at the lower end of the range
低端产品的例子



Bulgari's Petits et Mamans range is
classified as aromatic-floral and
aimed at both mums and babies
高端产品例子：芳香花卉香味，
针对妈妈和婴儿



Specialized and fusion products 专业化和融合产品

Dolce & Gabbana's baby perfume has prompted debate about marketing ethics

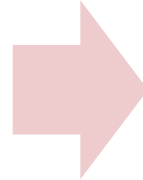


Dolce & Gabbana recently became the latest brand to launch a fragrance aimed at babies, claiming that its honey, citrus and musk scent will “accentuate” the naturally alluring smell of babies



Specialized and fusion products 专业化和融合产品

Staged baby personal care products mirrors a marketing theme in diapers



BabySpa offers soapless body washes, tearless shampoos, bubble bath milk and via a “Stages” system that targets different needs during a baby’s development



Summary 总结

Older savvier, ingredient-conscious parents

较年长精明,注重成分的父母



No nasties: safe and simple ingredient lists. And tell the supporting back-story

没有脏东西：安全和简单的配料表。并告诉背后的给力故事

Packaging provides important functional and emotional value in baby care

在婴儿护理包装提供重要的功能性和情感性价值



Ensure packaging conveys the derived benefits and delivers practical benefits

确保包装传达的它利益，
并提供实际的好处

Parents want to optimize their choices depending on their baby's needs and situational circumstances

家长要优化他们的选择，这取决于对自己的宝宝的需求和情况



Expect more products targeting different needs during a baby's development

在婴儿的发展期待更多针对
不同需求的产品，



Thank You!



For more information or arrange demonstration of database, please contact me:

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