INSIDE Beauty

DEC 2007

Autumn/Winter HAIR TRENDS

Become an EXPERT in skincare

Latest Irish retailer & market INSIGHTS

for shampoo, conditioner, styling, colourants, moisturisers & cleansers

P&G beauty

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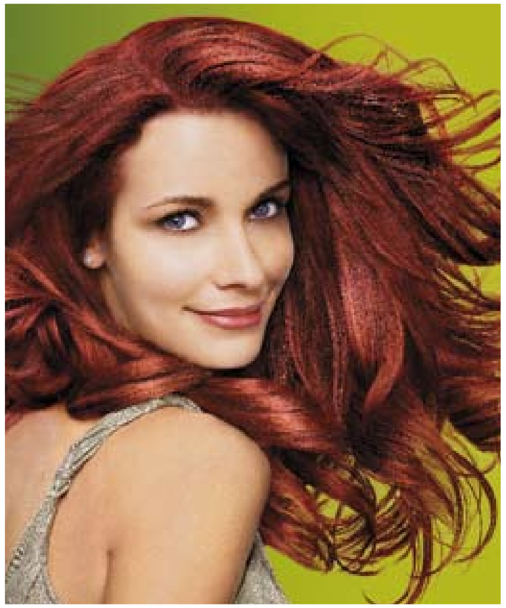

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Cover Stories

AUTUMN/WINTER
hair trends

Michael Douglas, celebrity stylist and Shockwaves Style Director, has over 15 years experience creating stunning styles. His talents include working backstage at the runways of London, New York and Paris, styling for his loyal celebrity clients and appearing in two hit TV style makeover shows.

Michael's most recent work sees him appearing on a prime time TV show, where he uses his trademark guerrilla styling techniques. Michael's sharp, intrinsic approach to create the freshest, most striking looks and his eye for on trend wearable hair are reasons why Shockwaves just had to have him on board.

Michael gives you his take on Autumn/Winter 07 styles inspired by the catwalk to get you noticed for all the right reasons. Whether you go for this seasons sleek polished high ponytail, inverted 'Parisian' inspired waves or opt for the reinvention of the quiff there is a cream, mousse, gel, spray or wax to help you achieve the style you want in the Shockwaves range.

Trend One:
'The Sleek High Ponytail'

Essential Products: Shockwaves Ultra Strong Tuff Stuff Gel and Power Hold Hairspray.

"The trick to this style is to apply a smidgen of gel all around the hairline across the fringe and round to the back of your ears. This will give the smoothest result preventing any baby hairs or flyways sticking up and ruining the 'sleek' finish. The Tuff Stuff formula is perfect with its heat and sweat-proof ingredients for when the action heats up during the party season. A generous all over application of hairspray is essential for long lasting hold and to keep every hair, neatly brushed to perfection, in place."

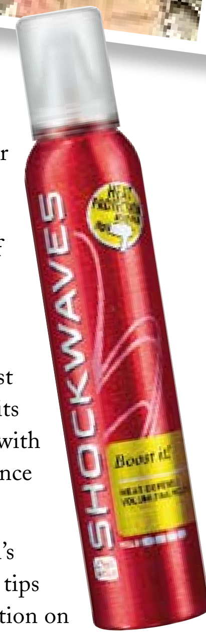
Trend Two:
'Inverted Waves'

Essential Products: Shockwaves Twirl It! Heat Defence Curl Shaping Mousse & Shockwaves Ultimate Effects Foaming Wax.

"Apply the Curl Shaping Mousse to damp hair to protect it from the heat as you blow-dry it in. The mousse will prepare the hair making it more malleable to create and hold waves using large barrelled curling tongs. Waves look best separated, so finish by squeezing a small amount of Foaming Wax into mid-lengths and ends. This formula will give you the definition and shine of a wax with the lightness of a mousse to ensure it doesn't weigh waves down."

Trend Three:
'The Quiff'

Essential Products: Shockwaves Boost It! Heat Defence Volumising Mousse & Shockwaves Ultimate Effects Wonder Freeze Hairspray.



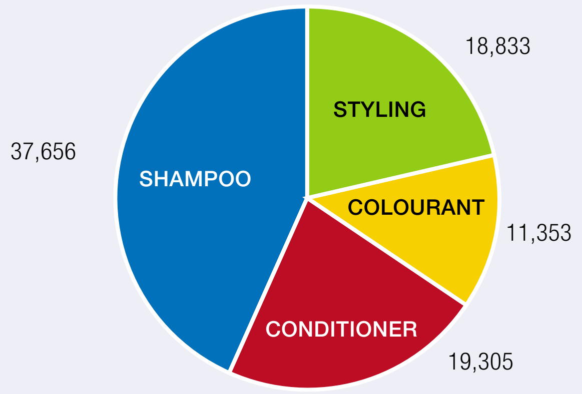
"Using this mousse will give your hair the body it needs to be able to create a quiff, whilst protecting your hair against the heat of your hairdryer. Make sure you apply liberally to your roots, as they are the foundation to your quiff. Once you have backcombed, teased and pushed your quiff into place securing with grips, spray with hairspray. The Freeze Spray ensures the most controlled quiff with its ultra strong hold but with a flexible finish for dance proof styling."

To check out Michael's latest work, hints and tips and for more information on Shockwaves products visit **www.style-attract-play.co.uk**

the
Total Haircare CATEGORY

TOTAL CATEGORY VALUE '000s

€87.1M (+7.4%) vs Year Ago



Source: MAT 10WE 09 SEP 07 ACNielsen Market

the CATEGORY

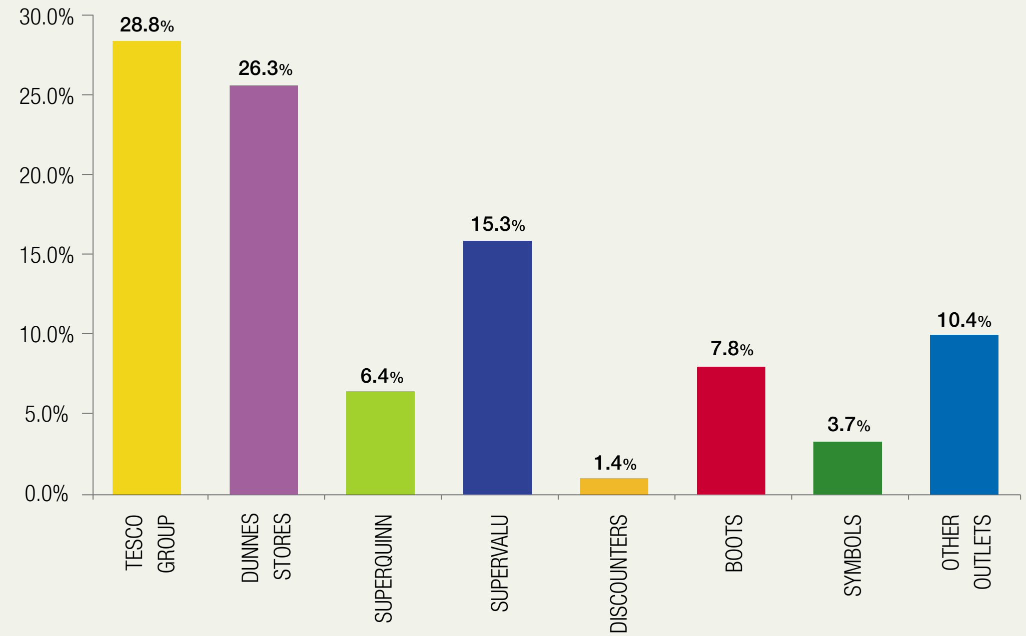
	VALUE SHARE OF TOTAL HAIR	VALUE SALES % CHANGE V. YA	YOY VALUE SHARE %PT CHG	UNIT SHARE OF TOTAL HAIR	UNIT SALES % CHANGE V. YA	YOY UNIT SHARE %PT CHG
TOTAL HAIRCARE		7.4			8.1	
SHAMPOO	43.2	4.6	-1.2	52.4	7.3	-0.4
CONDITIONER	22.2	11.6	0.8	24.2	8.2	0.0
COLOURANT	13.0	10.7	0.4	11.2	15.5	0.7
STYLING	21.6	7.2	0.0	12.2	5.4	-0.3

Source: MAT 10WE 09 SEP 07 ACNielsen Market track

the RETAILERS

the RETAILERS

Retailer Share of Total Haircare



Source: TNS 52 w/e 7th Sep 2007

THE CATEGORY

The total Haircare category continues its strong growth (+7.4% vs. yr ago) with all four areas growing at an impressive pace.

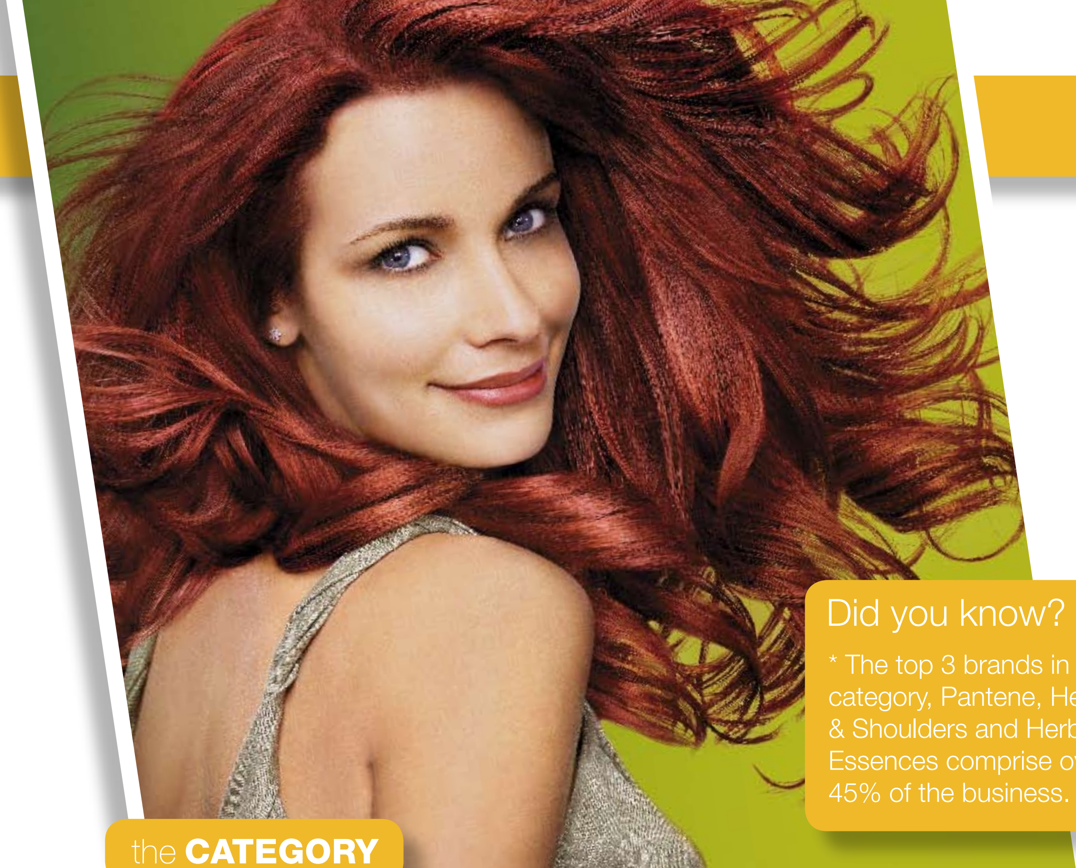
Shampoo is the dominant category with conditioners (22.2%) and styling (21.6%) having similar value shares.

THE RETAILERS

Tesco (28.8%) and Dunnes Stores (26.3%) are the market leaders in the total Haircare category with both recording positive growth.

Supervalu (15.3%) has the next biggest share of total Haircare but is in decline.

The top 5 retailers account for 84.6% of the total Haircare business, a +0.3% points change on last year.



MASS CARE

Did you know?

* The top 3 brands in this category, Pantene, Head & Shoulders and Herbal Essences comprise over 45% of the business.

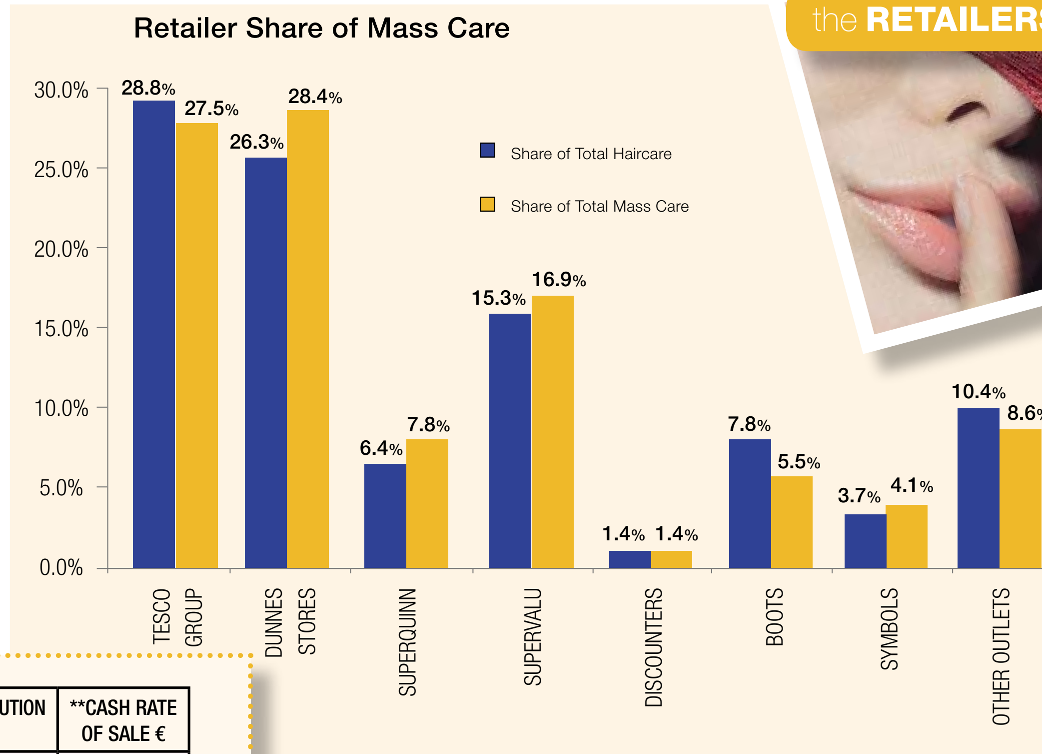
the CATEGORY

	VALUE SHARE OF MASS HAIR	VALUE SALES % CHANGE V. YA	YOY VALUE SHARE %PT CHG	UNIT SHARE OF TOTAL HAIR	UNIT SALES % CHANGE V. YA	YOY UNIT SHARE %PT CHG	*DISTRIBUTION %	**CASH RATE OF SALE €
TOTAL HAIR		6.9			7.6			
PANTENE	18.6	15.3	1.4	14.6	14.1	0.8	63	27,549
HEAD&SHOULDERS	13.9	12.6	0.7	10.5	11.4	0.4	57	19,362
HERBAL ESSENCE	12.7	22.1	1.6	12.9	34.0	2.5	62	28,373
ELVIVE	10.4	17.1	0.9	10.0	44.2	2.5	35	10,196
SUNSILK	5.4	-13.7	-1.3	5.0	-19.9	-1.7	50	16,859
TRESEMME	5.0	-9.8	-0.9	7.5	-16.3	-2.2	28	9,020
DOVE	4.4	-6.6	-0.6	4.1	-4.4	-0.5	53	7,081
TIMOTEI	3.7	-4.3	-0.4	4.4	-9.3	-0.8	58	6,821
VO5	3.0	-19.3	-1.0	3.3	-12.3	-0.7	36	13,858
FRUCTIS	2.7	12.2	0.1	2.7	26.9	0.4	30	13,368
JOHN FRIEDA	2.5	50.6	0.7	0.8	53.3	0.2	16	22,747
JOHNSON	2.2	14.1	0.1	3.4	12.5	0.2	40	7,423
AUSSIE	2.2	24.4	0.3	1.2	30.9	0.2	13	8,755
PRIVATE LABEL	2.1	-2.8	-0.2	4.6	-2.0	-0.5	7	14,996

*Distribution is the average percentage of stores that have sold the item during a particular period
**Rate of Sale is the sales performance of a particular item/brand per one percent of distribution

Source: MAT 10WE 09 SEP 07
ACNielsen Market track

the RETAILERS



Source: TNS 52 w/e 7th Sep 2007

THE CATEGORY

Value sales vs. a year ago increased for the key brands in this category, Pantene (+15.3%), Head & Shoulders (+12.6%), Herbal Essence (+22.1%) and Elvive (+17.1%) with premium brands John Frieda (+50.6%) and Aussie (+24.4%) also recording extremely high increases.

The top three brands in this category, Pantene, Head & Shoulders and Herbal Essences comprise over 45% of the business.

Sunsilk (-13.7%), Tresemme (-9.8%) and VO5 (-19.3%) recorded the biggest decreases.

Cash rate of sale is highest for Pantene, H&S, Herbal Essence and John Frieda.

THE RETAILERS

Within the largest retailers only Dunnes Stores (+1.9 % pts) and Superquinn (+1.3 % pts) have grown with Tesco remaining relatively unchanged. (+0.1 pts)

Boots recorded negative growth in this category (-2.3 % pts).

Tesco and Boots under trade in this category, with the opposite being true for Dunnes Stores, Superquinn & Supervalu.

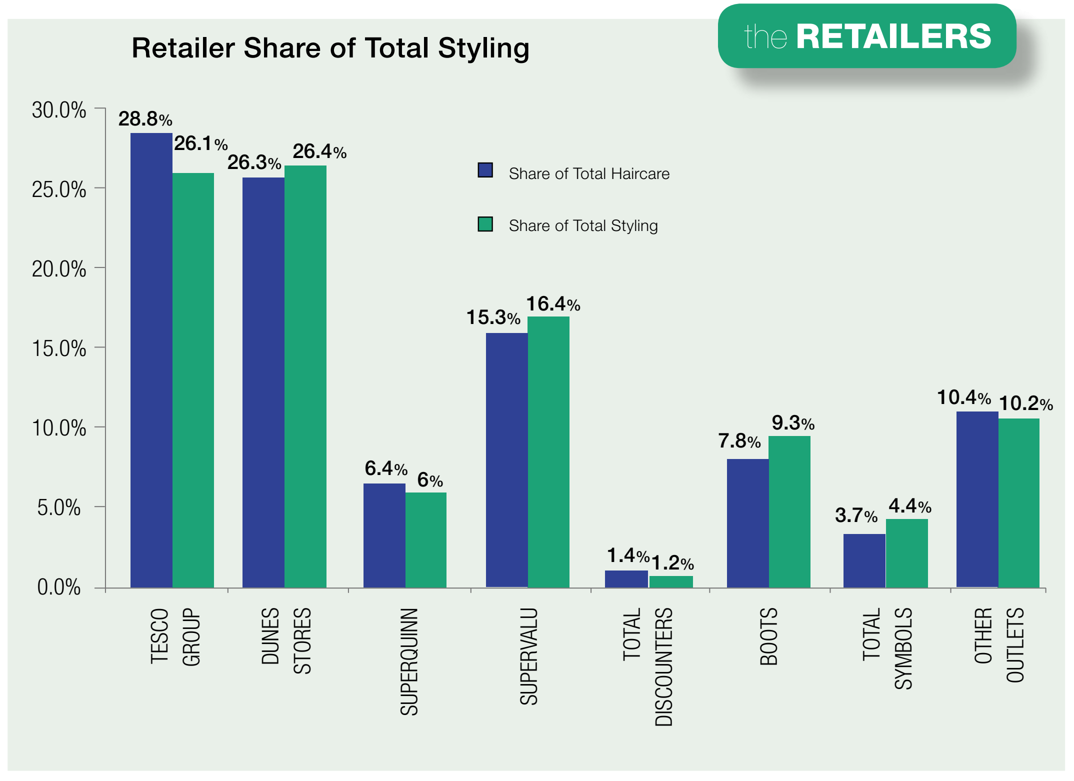
STYLING

the CATEGORY

	VALUE SHARE OF STYLING	VALUE SALES % CHANGE V. YA	YOY VALUE SHARE %PT CHG	UNIT SHARE OF STYLING	UNIT SALES % CHANGE V. YA	YOY UNIT SHARE %PT CHG	*DISTRIBUTION %	**CASH RATE OF SALE €
TOTAL STYLING		6.5			4.2			
BRYLCREEM	30.8	12.2	1.6	25.9	19.6	3.3	87	2,147
SHOCK WAVES	12.1	-13.9	-2.9	11.5	-2.5	-0.8	39	1,012
SILVIKRIN	8.1	12.8	0.5	15.2	7.8	0.5	27	957
JOHN FRIEDA	6.6	15.3	0.5	2.6	11.4	0.2	14	1,500
PANTENE	6.4	29.6	1.1	6.9	18.7	0.8	26	1,124
ELNETT	6.4	56.1	2.0	5.1	44.8	1.4	21	2,821
VO5	4.8	9.3	0.1	3.9	-5.4	-0.4	15	1,115
DAX	4.3	3.2	-0.1	2.7	2.9	0.0	60	1,390
FRUCTIS STYLE	3.7	17.8	0.4	2.9	20.9	0.4	8	1,301
TRESEMME	3.6	-6.3	-0.5	4.4	-11.9	-0.8	16	1,120
STUDIO LINE	2.4	-0.9	-0.2	1.8	2.1	0.0	6	1,748

*Distribution is the average percentage of stores that have sold the item during a particular period
**Rate of Sale is the sales performance of a particular item/brand per one percent of distribution

Source: MAT 10WE 09 SEP 07 ACNielsen Market track



Source: TNS 52 w/e 7th Sep 2007

THE CATEGORY

Ellnet (+56.1%) and Pantene (+29.6%) saw the biggest growth this year with Shockwaves recording a decline in value sales (-13.9%) while still maintaining quite a strong base. Brylcreem also recorded positive growth and remains market leader.

THE RETAILERS

Dunnes Stores recorded significant positive growth in this category (+4.1% pts) with Boots (-1.3 % pts) and Tesco (-0.8 % pts) seeing negative results.

Tesco and Superquinn under trade in this category.

COLOURANTS

THE CATEGORY

Category leader Clairol Nice N' Easy, which makes up almost one third of the colourants business in Ireland, recorded very high growth (+34.3%) with Live Colour XXL (+60.8%), Garnier Nutrisse (+78%), Casting (+65%) and Just For Men (+40.2%) all posting extremely high growth figures. There was a serious decline for both Couleur Experte (-31.1%) and Feria (-33.1%).

Did you know?

* 90% of females in the UK & Ireland have coloured their hair at some point in their lives.

* Nice N'Easy is Ireland's No1 colourant (Vol Sales Sept 06-Sept 07) with more shades of permanent colour (42 in total) than any other brand.

* 60% of UK & Ireland's female population curently use hair colour (home & salon).

the CATEGORY

	VALUE SHARE OF TOTAL COLOUR	VALUE SALES % CHANGE V. YA	YOY VALUE SHARE %PT CHG	UNIT SHARE OF TOTAL COLOUR	UNIT SALES % CHANGE V. YA	YOY UNIT SHARE %PT CHG	*DISTRIBUTION %	**CASH RATE OF SALE €
TOTAL COLOURANTS		10.7			15.5			
CLAIROL NICE N EASY	31.3	34.3	5.5	31.7	44.6	6.4	N/A	N/A
EXCELLENCE	10.2	8.1	-0.2	6.9	8.4	-0.5	N/A	N/A
CLAIROL LASTING COLOUR	8.0	-5.4	-1.4	8.3	-6.2	-1.9	N/A	N/A
LOVING CARE	6.9	3.4	-0.5	9.4	3.6	-1.1	N/A	N/A
CLAIROL HERBAL ESSENCES	6.0	18.2	0.4	4.4	17.7	0.1	N/A	N/A
VIVA	5.4	-20.6	-2.1	4.8	-24.5	-2.5	N/A	N/A
LIVE COLOUR XXL	4.6	60.8	1.4	4.6	60.0	1.3	N/A	N/A
GARNIER NUTRISSE	4.3	78.0	1.6	4.1	89.3	1.6	N/A	N/A
CASTING	3.7	65.0	1.2	3.0	48.5	0.7	N/A	N/A
JUST FOR MEN	3.1	40.2	0.6	2.0	40.1	0.4	N/A	N/A
COULEUR EXPERTE	2.7	-31.1	-1.6	1.3	-30.2	-0.8	N/A	N/A
FERIA	2.4	-33.1	-1.6	1.7	-31.9	-1.2	N/A	N/A
HAIR STREAKING KIT	2.0	-0.7	-0.2	1.6	-5.1	-0.4	N/A	N/A

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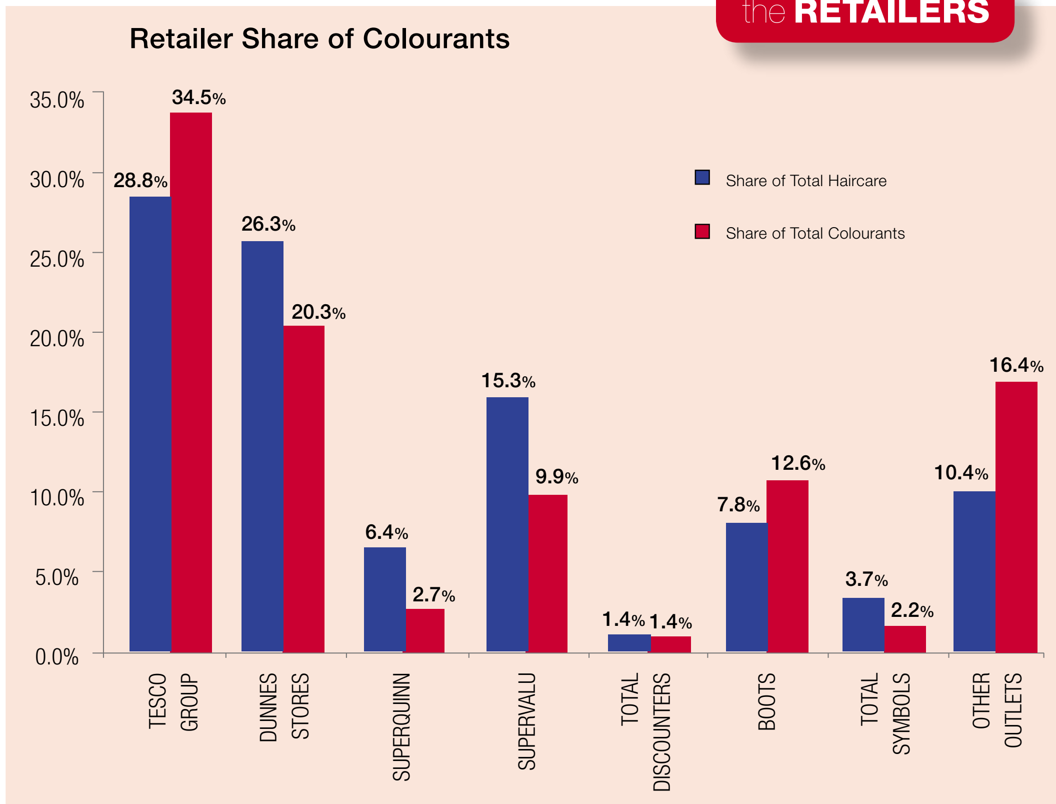
Source: MAT 10WE 09 SEP 07 ACNielsen Market track

the RETAILERS



Source: TNS 52 w/e 7th Sep 2007

THE RETAILERS

Tesco (+7.6 % pts) has massively grown its share of colourants with Dunnes Stores (+1.6 % pts) and Superquinn (+1.5 % pts) also contributing to the growth of the category.

Boots have seen a decline in the size of the colourants trade (-3.2 % pts) but still maintain a share way over their total category share.

Despite recording growth, Dunnes Stores still significantly under trade in this category.

SKINCARE

Become an EXPERT in the SKINCARE Category

	VALUE SHARE OF TOTAL SKIN	VALUE SALES % CHANGE V. YA	YOY VALUE SHARE %PT CHG	UNIT SHARE OF TOTAL SKIN	UNIT SALES % CHANGE V. YA	YOY UNIT SHARE %PT CHG
TOTAL SKIN CARE		6.8			6.3	
FACIAL MOISTURISERS	46.8	6.0	-0.3	30.3	1.8	-1.3
FACIAL CLEANSERS	53.2	7.4	0.3	69.7	8.4	1.3

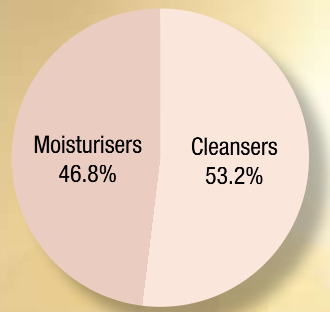
Skin care technology has become so advanced that NASA Scientist's are now employed to create creams

(Source BBC Website)

The N°1 cause of skin damage comes from sun exposure from ages 10-25

(Source: P&G Research)

TOTAL CATEGORY VALUE



24.9M (+6.8%) v. YAGO

Globally 6,853 new skincare products were launched in 2005 (ix 136) and this category continues to grow

(*Source: Mintel Facial Skincare report 03-2005 and HMG) Actuary 2004)*

Most housewives admit to hiding a skincare product in their weekly shopping budget

(Source: P&G CMK Research)

The average number of daily skincare products used by women in Korea is 8, compared to only 3 in the UK

(Source: World renowned Dr. Zaid Al-Qassab)

Your skin is the BIGGEST organ in your body. Look after it!

Last year, a 50ml Crème De La Mer product was sold for €1,500 making it the worlds most expensive face cream

(Source Crème De la Mere Website)

Moisturisers **SKINCARE**

Olay and Nivea amount to almost 56% of the facial moisturisers business.

THE RETAILERS

Boots are the market leader for moisturisers with a 32.5% share of market. They have recorded 6.8% pts growth vs. yr ago. Dunnes Stores share (18%) has also grown in this category (+3.9 % pts) and has overtaken Tesco (13.1%) which has declined over the last year (-4.9%).

THE CATEGORY

Facial Moisturisers Category
Market leaders in the facial moisturisers market are Nivea (29% share) and Olay (26.7% share) which both recorded positive growth.
Olay and Nivea are leading the field in terms of distribution and Cash Rate of Sale as well.

Olay and Nivea amount to almost 56% of the facial moisturisers business.

the CATEGORY

	VALUE SHARE OF MOISTURISER	VALUE SALES % CHANGE V. YA	YOY VALUE SHARE %PT CHG	UNIT SHARE OF MOISTURISER	UNIT SALES % CHANGE V. YA	YOY UNIT SHARE %PT CHG	*DISTRIBUTION %	**CASH RATE OF SALE €
FACIAL MOISTURISER		6.0			1.8			
NIVEA	29.0	25.4	4.5	27.3	23.8	4.8	64	4,725
OLAY	26.7	3.3	-0.7	26.4	-0.8	-0.7	67	4,155
DERMO EXPERTISE	11.7	-9.7	-2.0	6.3	-8.4	-0.7	53	2,288
SIMPLE	5.9	1.2	-0.3	7.6	-2.5	-0.3	60	1,016
SKIN NATURALS	5.5	-9.4	-0.9	4.1	-16.2	-0.9	50	1,149
PONDS	5.0	3.8	-0.1	8.8	2.1	0.0	65	795
PRIVATE LABEL	4.5	31.7	0.9	7.2	27.1	1.4	35	1,334
NEUTROGENA	2.4	45.9	0.7	2.2	81.0	1.0	49	509
JOHNSON'S	2.2	5.7	0.0	2.6	-7.9	-0.3	53	434
JOHNSON'S HOLIDAY SKIN	1.8	-57.2	-2.7	2.4	-63.3	-4.2	51	365
L'OREAL MEN EXPERT	1.7	26.2	0.3	1.0	1.8	0.0	21	849

*Distribution is the average percentage of stores that have sold the item during a particular period
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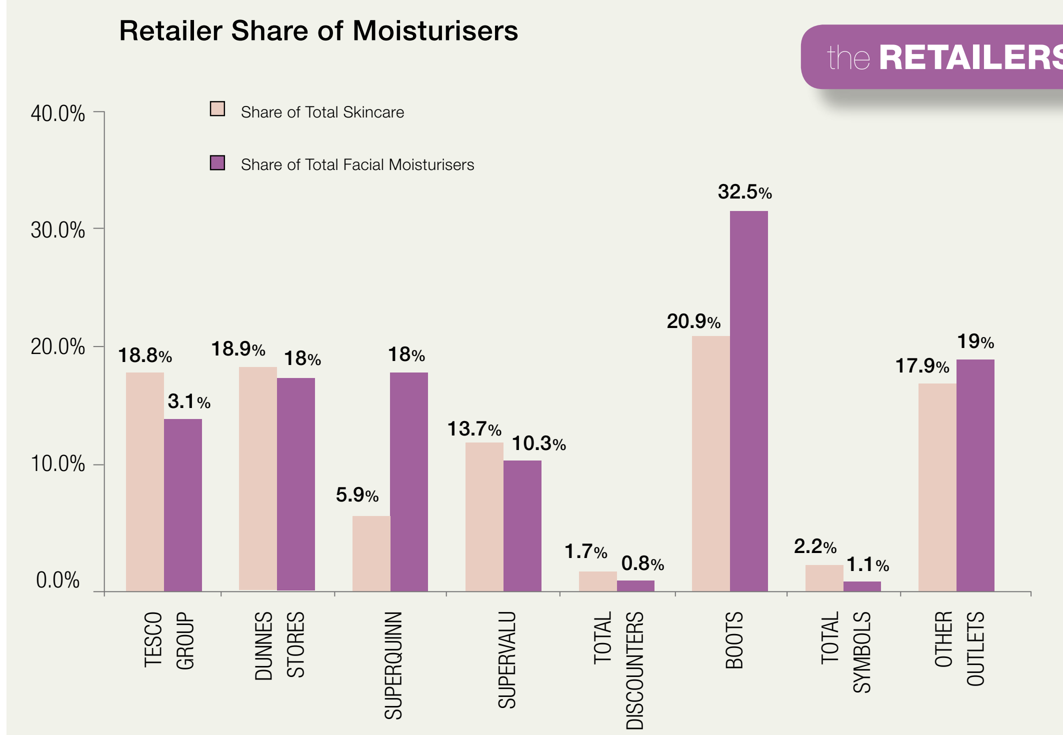
Source: MAT 10WE 09 SEP 07 ACNielsen Market track

the RETAILERS



Source: TNS 52 w/e 7th Sep 2007

Cleansers SKINCARE

THE RETAILER

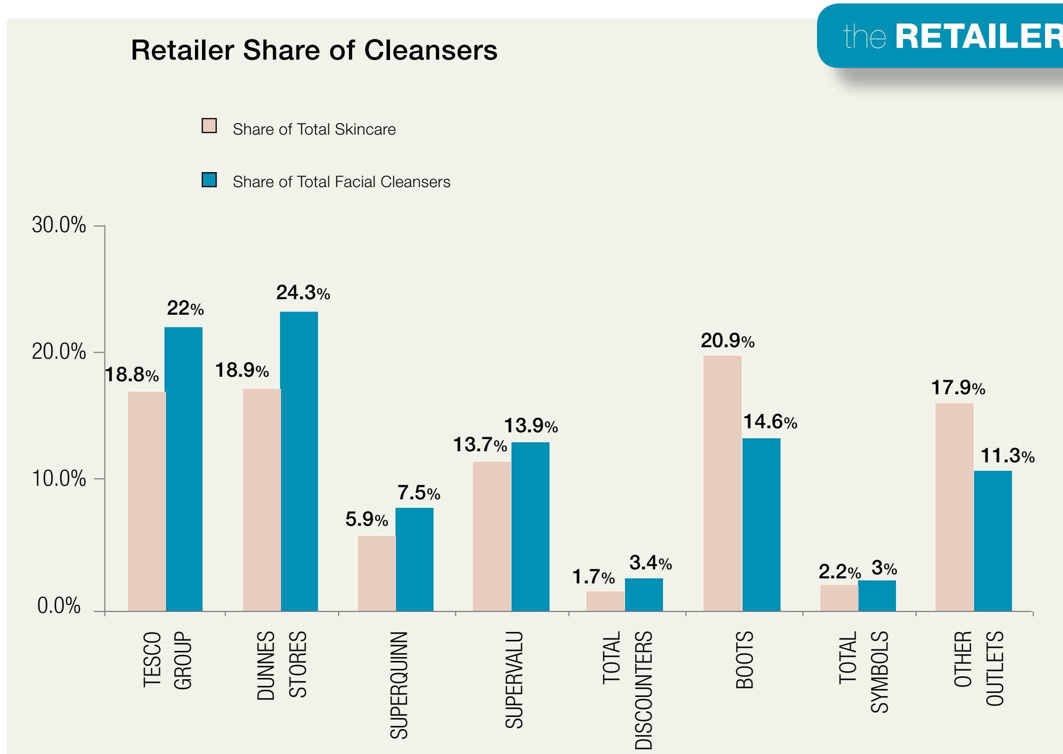
Dunnes Stores (24.3%) leads the retailer share for facial cleansers and again has overtaken Tesco (23.9%) in the last year.

Boots (14.6%) has a significantly lower share in this category than in moisturisers perhaps due to the higher value involved in moisturisers.

THE CATEGORY

Nivea is the market leader in the facial cleansers market (25.4%) which is driven by its huge share in facial wipes.

the RETAILERS



Source: TNS 52 w/e 7th Sep 2007

the CATEGORY

	VALUE SHARE OF CLEANSER	VALUE SALES % CHANGE V. YA	YOY VALUE SHARE %PT CHG	UNIT SHARE OF TOTAL CLEANSER	UNIT SALES % CHANGE V. YA	YOY UNIT SHARE %PT CHG	*DISTRIBUTION %	**CASH RATE OF SALE €
FACIAL CLEANSER		7.4			8.4			
NIVEA	25.4	32.5	4.8	21.1	42.5	5.0	73	4,083
JOHNSON'S	17.7	-0.1	-1.3	17.1	2.0	-1.1	76	2,757
SIMPLE	14.7	3.1	-0.6	11.3	6.0	-0.3	69	2,487
PRIVATE LABEL	8.8	31.0	1.6	15.5	45.1	3.9	55	1,879
OLAY	7.7	-0.2	-0.6	5.8	-4.7	-0.8	64	1,417
MONTAGNE JEUNESSE	4.4	-9.9	-0.9	10.8	-11.3	-2.4	44	1,175
DERMO EXPERTISE	3.7	-24.7	-1.6	2.3	-24.6	-1.0	45	957
NEUTROGENA	3.3	80.3	1.3	2.4	76.1	0.9	53	747
PONDS	2.8	12.6	0.1	2.5	6.7	0.0	61	543
SKIN NATURALS	2.8	-3.1	-0.3	2.3	-2.5	-0.3	41	795
ST IVES	2.4	-13.8	-0.6	1.5	-32.2	-0.9	41	678
E45	1.2	136.0	0.6	0.8	111.7	0.4	31	451
NICE N CLEAN	1.2	178.9	0.7	1.5	148.6	0.9	18	760
CAMILLE	1.1	-43.5	-1.0	2.2	-37.2	-1.6	19	664

*Distribution is the average percentage of stores that have sold the item during a particular period

**Rate of Sale is the sales performance of a particular item/brand per one percent of distribution

Source: MAT 10WE 09 SEP 07 ACNielsen Market track

If you have any questions on the content of the magazine, or have any suggestions for future editions, please contact

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