



ABell

# UNDER THE SEA

Fragrances and Botanical Extracts for Kids Products



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# MARKET REVIEW

## BABY & KIDS PRODUCTS

# Glossary

## **Baby and Kids Products – Personal Care (total)**

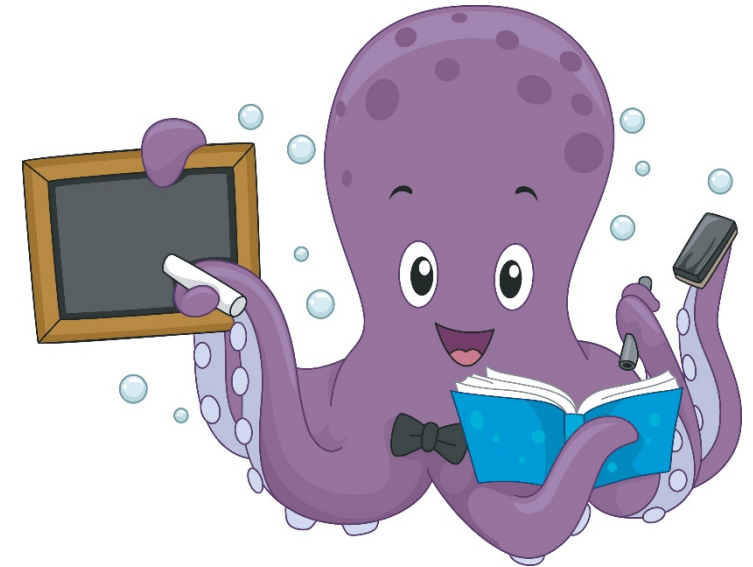
Includes products for babies and toddlers aged 0-3 years and products for children under 11 years of age. Adult products with a secondary claim such as “suitable for children and sensitive skins”, are not included.

## **Baby and Kids Products – Skin Care**

Includes oils, creams and lotions marketed specifically for babies and young children. Excluded are nappy rash creams and any other medicated skin care products.

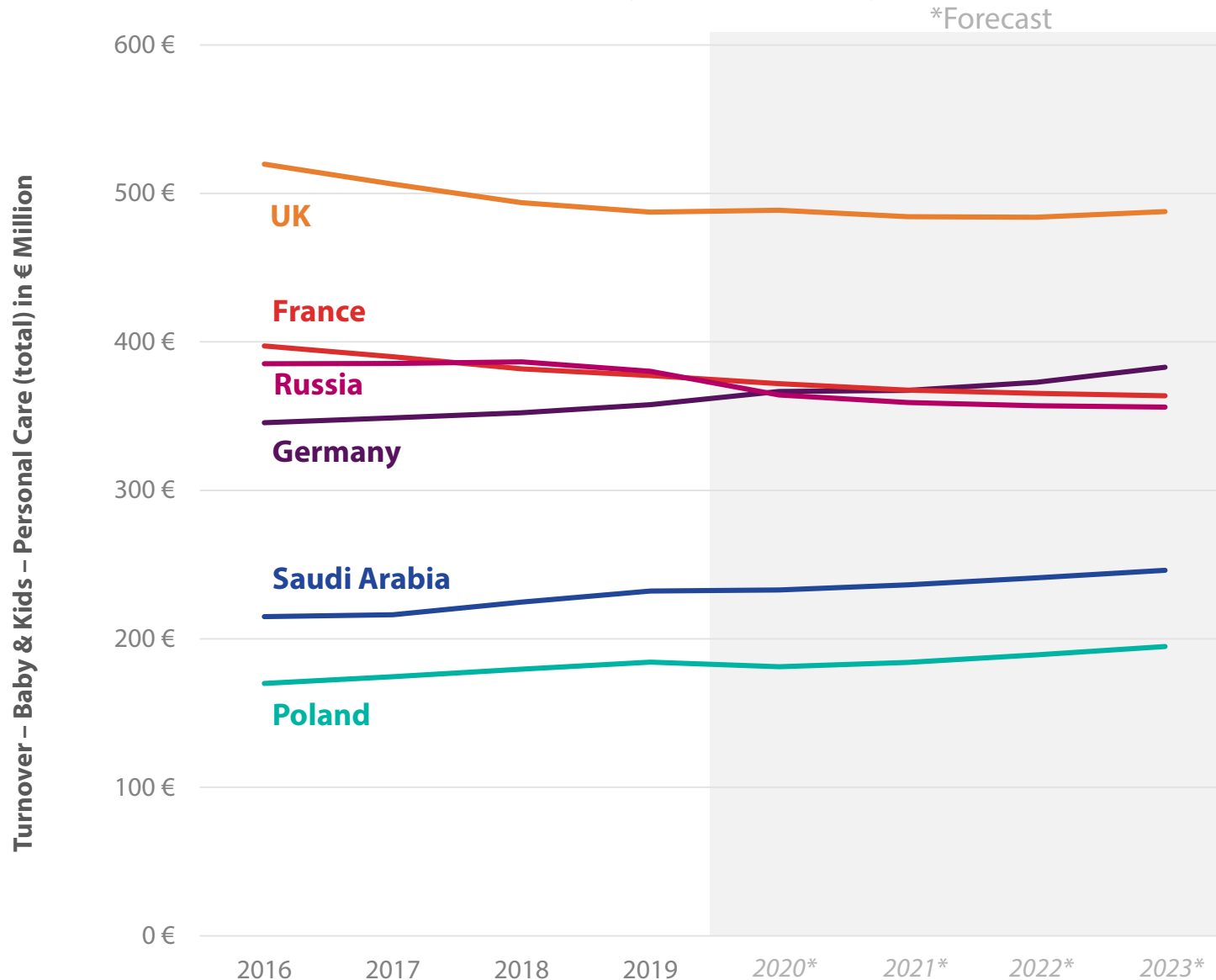
## **Baby and Kids Products – Toiletries**

Includes bath products for babies, toddlers aged 0-3 years and kids as well as fragrances. Bath products include e.g. bath additives, shower gel and soaps marketed specifically for babies and/or children.





# Sales Trends – Baby and Kids Products Personal Care (total) by Country

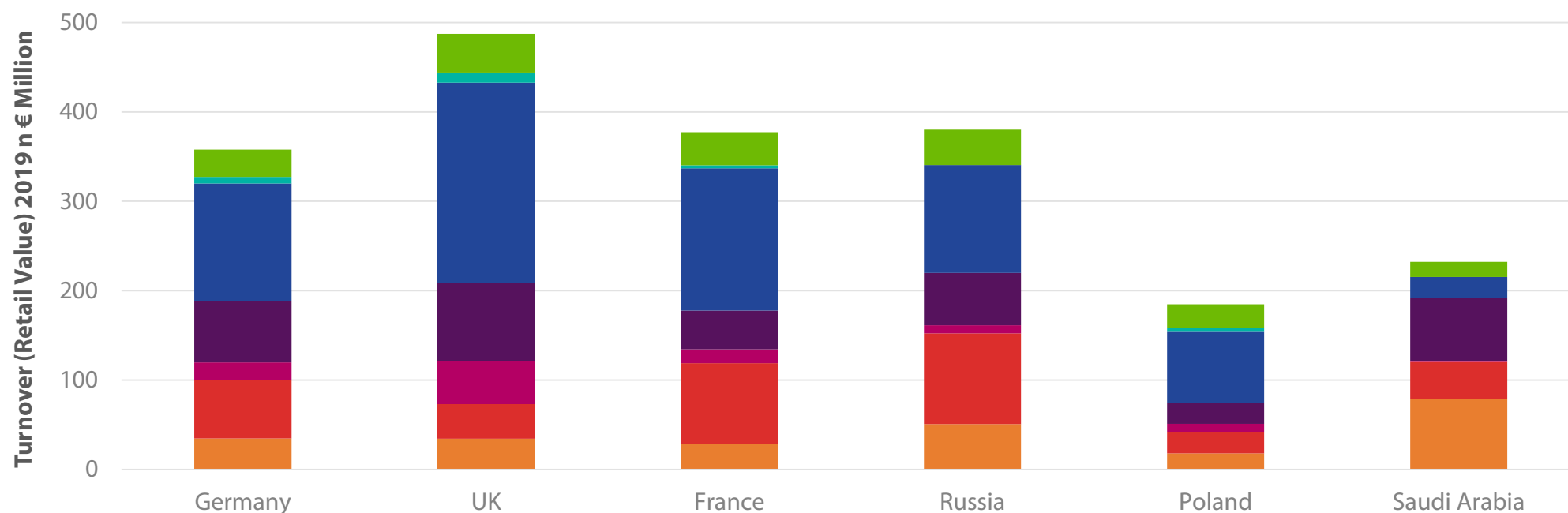


Compared to the other countries examined, **UK** ranks at the top with sales of around **EUR 487.3 million** in 2019. However, stagnation is forecast for the coming years.

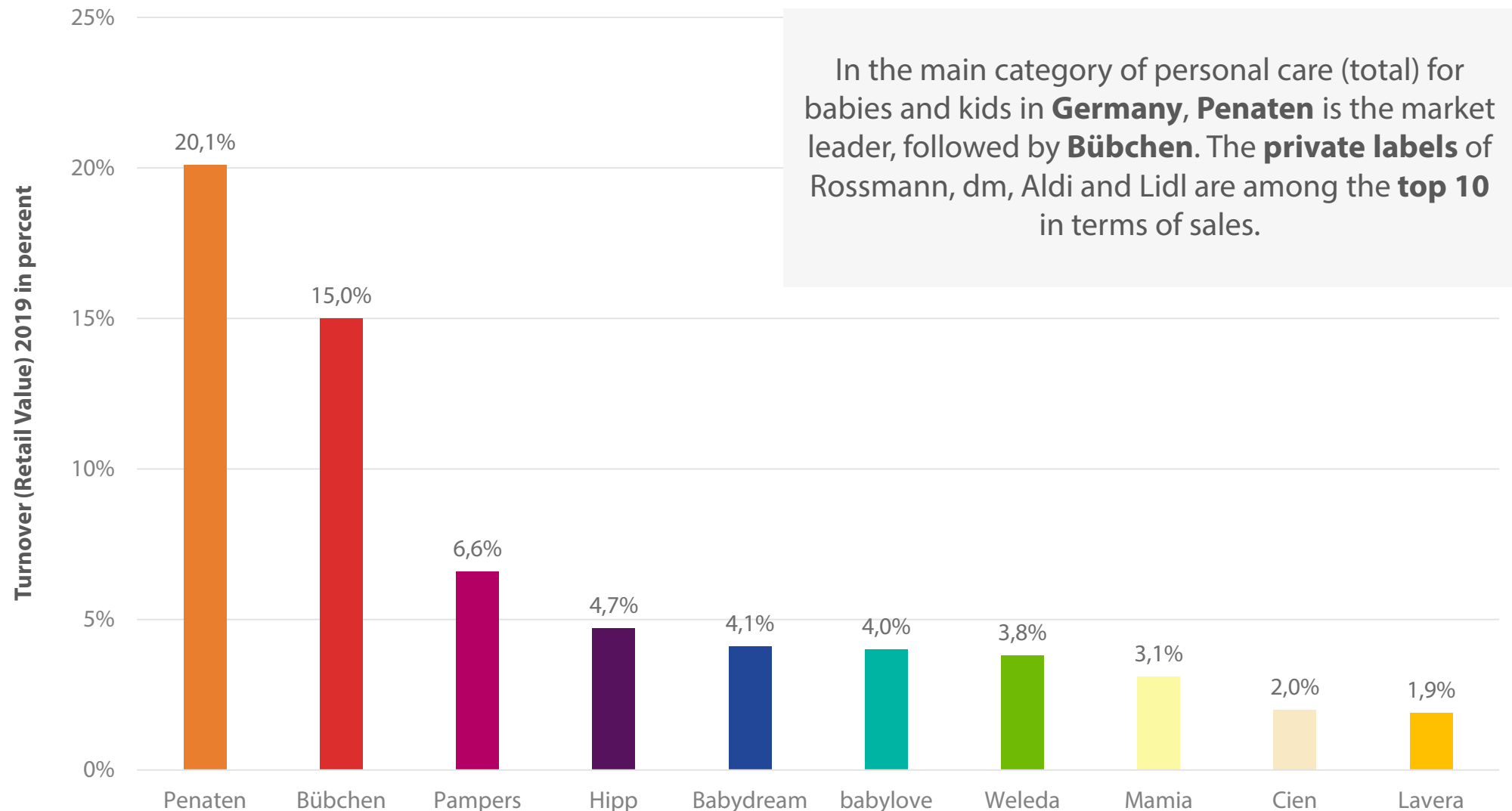
**France, Russia** and **Germany** will approach each other at around **EUR 370 million** in the next few years, with Germany forecasting a significantly more positive development than France and Russia, where annual sales will decrease.

# Distribution of Sales – Baby and Kids Products

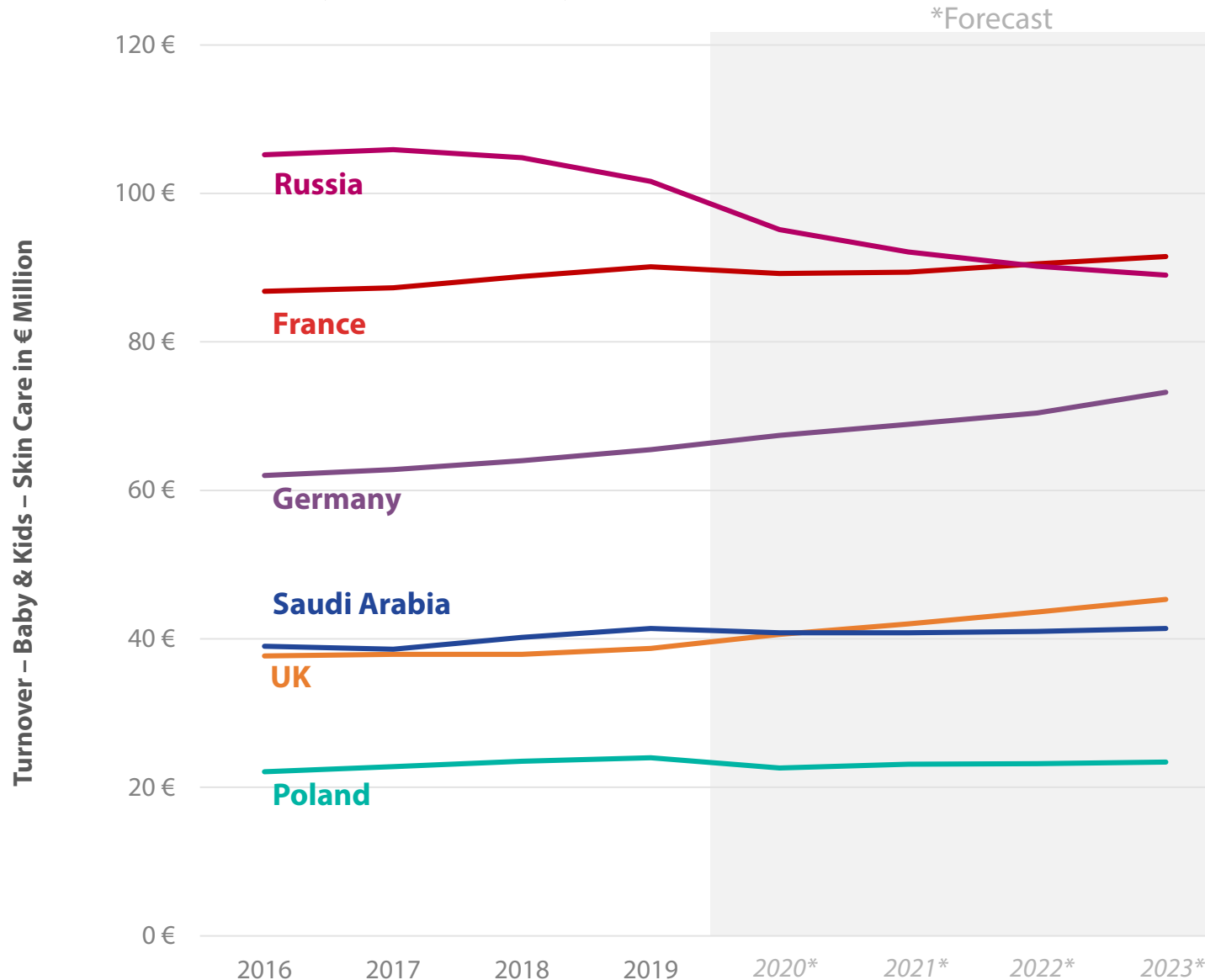
## Personal Care (total) by Country & Product Category



# Market Share – Baby and Kids Products Personal Care (total) in Germany (2019)



# Sales Trends – Baby and Kids Products Skin Care by Country









**Russia** leads the market with EUR 101.6 million in 2019, followed by **France** (EUR 90.1 million) and **Germany** (EUR 65.5 million) in 2019.

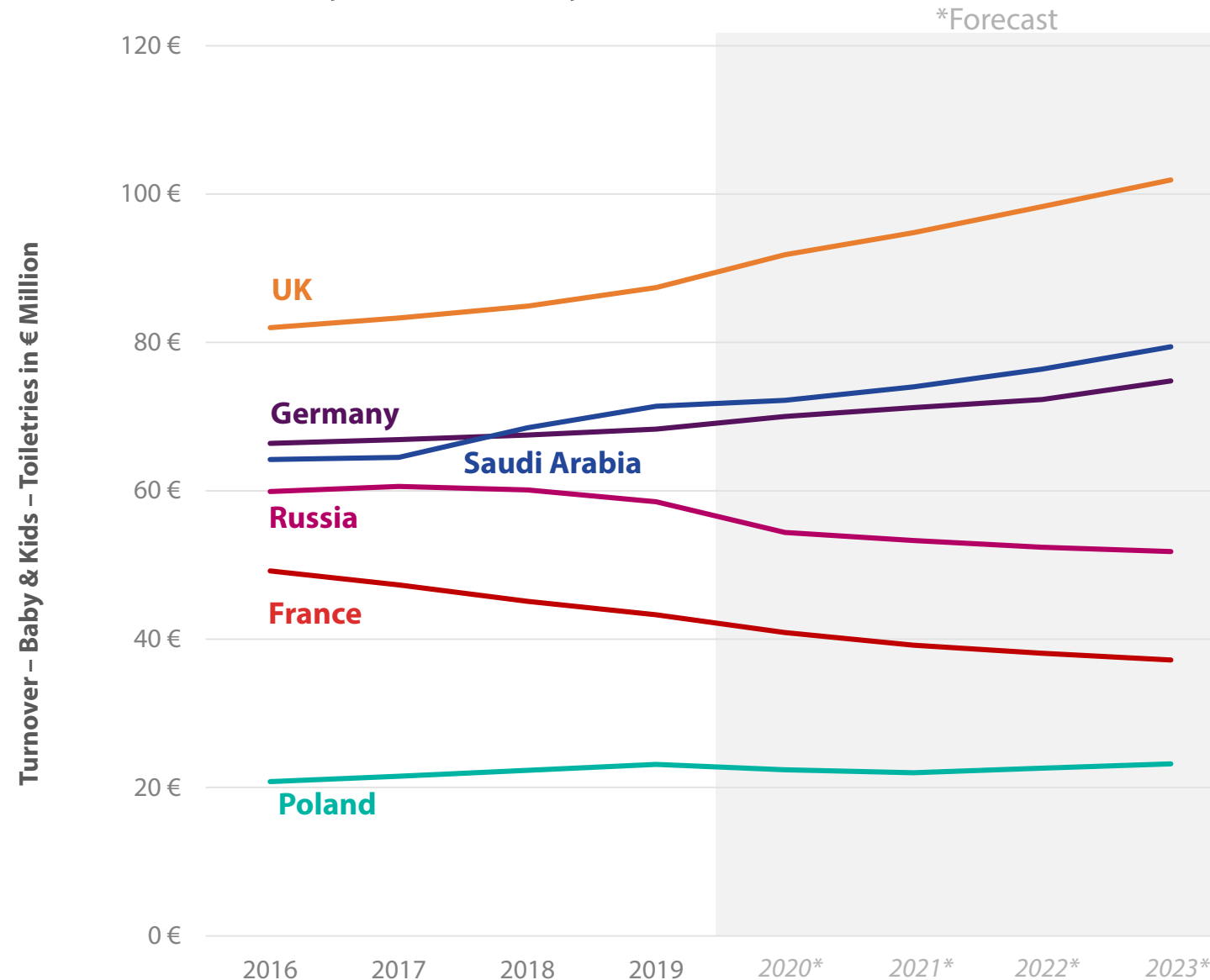
**Saudi Arabia** (EUR 41.4 million) and **UK** (EUR 38.7 million) were almost the same in 2019, with a more positive forecast for the British market. **Poland** has remained constant at around EUR 24 million for years.



# Top 3 Brands in Baby and Kids Products Skin Care by Turnover in Percent (2019)

Germany	UK	France	Russia	Poland	Saudi Arabia
 <b>PENATEN</b> (Johnson & Johnson Inc) 23,0%	 <b>Johnson's</b> (Johnson & Johnson Inc ) 42,8%	 <b>Mixa</b> (L'Oréal Groupe) 22,2%	 <b>Johnson's</b> (Johnson & Johnson Inc ) 19,5%	 <b>bambino</b> (Beiersdorf AG) 10,4%	 <b>Johnson's</b> (Johnson & Johnson Inc ) 55,4%
<b>Bübchen</b> (Nestlé SA) 20,4%	<b>Childs Farm</b> (Childs Farm Ltd) 17,6%	<b>Mustela</b> (Expanscience SA, Laboratoires) 18,9%	<b>Moe Solnyshko</b> (Avanta OAO ) 4,8%	<b>Johnson's</b> (Johnson & Johnson) 9,5%	<b>Nunu</b> (Batterjee Holding Co) 16,1%
<b>Weleda</b> (Weleda AG) 9,2%	<b>Aveeno</b> (Johnson & Johnson Inc) 10,0%	<b>Biolane</b> (Laboratoires Biopha SA) 10,2%	<b>Bübchen</b> (Nestlé SA) 3,9%	<b>Nivea</b> (Beiersdorf AG) 9,0%	<b>Sebamed</b> (Sebapharma GmbH & Co KG) 4,7%
<b>Private Label</b> 22,1%	<b>Private Label</b> 11,5%	<b>Private Label</b> 11,6%	<b>Others</b> 48,2%	<b>Private Label</b> 5,3%	<b>Others</b> 16,0%







# Sales Trends – Baby and Kids Products Toiletries by Country



In first place is **UK** with sales of EUR 87.4 million in 2019, followed by **Saudi Arabia** and **Germany** with around EUR 70 million.

In **Russia** (EUR 58.5 million, 2019) and **France** (EUR 43.3 million, 2019), sales have declined in recent years and this development will continue. In contrast, the **Polish** market is stable (EUR 23.1 million, 2019).

# Top 3 Brands in Baby and Kids Products Toiletries by Turnover in Percent (2019)

Germany	UK	France	Russia	Poland	Saudi Arabia
 <p><b>PENATEN</b> (Johnson &amp; Johnson Inc) 26,2%</p>	 <p><b>Johnson's</b> (Johnson &amp; Johnson Inc ) 29,3%</p>	 <p><b>Mustela</b> (Expanscience SA, Laboratoires) 16,0%</p>	 <p><b>Johnson's</b> (Johnson &amp; Johnson Inc ) 18,0%</p>	 <p><b>Johnson's</b> (Johnson &amp; Johnson Inc) 14,6%</p>	 <p><b>Johnson's</b> (Johnson &amp; Johnson Inc ) 73,9%</p>
<p><b>Bübchen</b> (Nestlé SA) 14,7%</p>	<p><b>Aveeno</b> (Johnson &amp; Johnson Inc) 7,6%</p>	<p><b>Cadum</b> (L'Oreal Groupe) 10,5%</p>	<p><b>Avon</b> (Avon Products Inc) 4,5%</p>	<p><b>Bambino</b> (Beiersdorf AG)) 13,2%</p>	<p><b>Nunu</b> (Batterjee Holding Co) 3,4%</p>
<p><b>Weleda</b> (Weleda AG) 7,3%</p>	<p><b>Childs Farm</b> (Childs Farm Ltd) 7,2%</p>	<p><b>Dop</b> (L'Oreal Groupe) 7,7%</p>	<p><b>Happy Moments</b> (Unilever Group) 4,5%</p>	<p><b>Nivea</b> (Beiersdorf) 11,3%</p>	<p><b>Sebamed</b> (Sebapharma GmbH &amp; Co KG) 2,9%</p>
<p><b>Private Label</b> 33,2%</p>	<p><b>Private Label</b> 13,8%</p>	<p><b>Private Label</b> 10,4%</p>	<p><b>Private Label</b> 8,6%</p>	<p><b>Private Label</b> 15,4%</p>	<p><b>Others</b> 15,3%</p>





# **LATEST MARKET PRODUCTS**

## **TENSIDE AND CREAM PRODUCTS**



# Market Products – Transparency

Kids Löwenstark & Blumenfee  
Shampoo & Shower Gel 2in1  
Pure 97



What Is In	And Why
INGREDIENTS: Aqua (Water)	WIRKUNG: Löst & verdünnt andere Inhaltsstoffe organisch
Lauryl Glucoside	Unterstützt die Reinigung & Konsistenz
Sodium Cocoamphoacetate	Unterstützt die Schaumbildung & Reinigung
Glycerin	Spendet & speichert Feuchtigkeit im Kinderhaar & auf der zarten Kinderhaut
Sodium Lauroyl Sarcosinate	Unterstützt die Schaumbildung & Reinigung
Cocamidopropyl Betaine	Unterstützt die Schaumbildung & Reinigung
Polysorbate 20	Optimiert die Konsistenz
PEG-120 Methyl Glucose Dioleate	Optimiert die Konsistenz
Palmitamidopropyltrimonium Chloride	Pflegt die zarte Kinderhaut & spendet Feuchtigkeit
Phenoxyethanol	Verlängert die Haltbarkeit
Parfum (Fragrance)	Intensiviert den Duft
2-Bromo-2-Nitropropane-1,3-Diol	Verlängert die Haltbarkeit
Taraxacum Officinale (Dandelion) Juice	Pflegt die zarte Kinderhaut & spendet Feuchtigkeit



# Market Products – Topic-specific Products

Tiger Wash  
Shampoo & Shower Gel 2in1  
Bübchen



Wash Alarm  
Shampoo & Shower Gel 2in1  
Bübchen



Happy Berry  
Shower Gel  
Bübchen



Be A Star  
Shampoo Shower  
Bübchen





# Market Products – Known Brands

From Head to Toe  
Shampoo & Bath  
Nivea



Wash & Shower Cream  
Shower Cream  
Penaten



Baby Soft  
Shampoo & Shower  
Hipp



# Market Products – Natural Cosmetics

Bio Calendula Baby  
Wash Lotion & Shampoo  
Alverde Natural Cosmetics



Bio Calendula Baby  
Wound Cream & Caring Cream  
Alverde Natural Cosmetics



Get Strong!  
Shower, Shampoo & Foam Bath 3in1  
Dreckspatz



Calendula  
Wash Lotion & Shampoo  
Weleda





# Market Products – Functional Claims

SOS Cream  
Cream  
Penaten



Wind & Weather  
Cream  
Nivea



Wind and Weather  
Cream  
Babydream





# Market Products – International Bath & Shower Products

Yummy Donuts  
Liquid Soap & Shower Gel 2in1  
Shik (Ukraine)



Mighty Mint  
Natural Shampoo & Shower  
Weleda (UK)



Sweet Berry Scent  
Shower & Shampoo  
Fa Kids (Belgium)



Extra Soft  
Bath Shower  
Carrefour Kids (France)

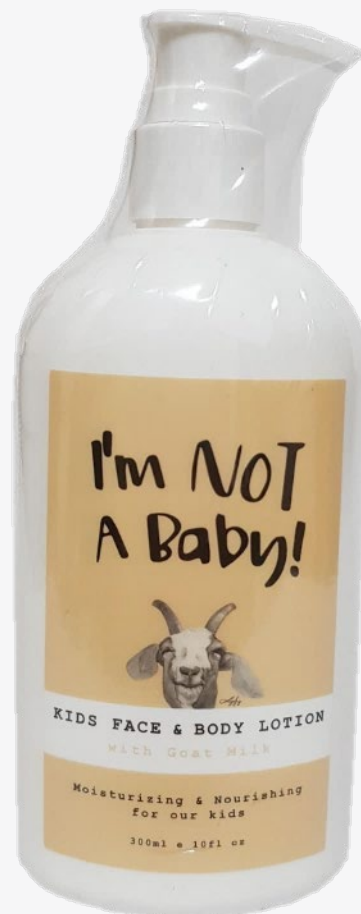


# Market Products – International Skin Care Products

Bedtime  
Body Milk  
Johnson's (Poland)



I'm Not A Baby  
Face & Body Lotion  
Genie The Bottle (South Korea)



Mild & Nourish  
Hand Cream  
Bbhome Kids (China)



Little Times  
Baby Cream  
Lenta (Russia)







# **UNDER THE SEA**

## **FRAGRANCES AND BOTANICAL EXTRACTS**



# Concept Proposal – Under The Sea

An exciting and **multi-faceted topic**, which, depending on the design and images, is suitable for both the **little ones** and the **older kids**. The popularity of the topic can be seen in the regular product launches related to the **marine world**.

Bell's **fragrance** proposals cover a **broad portfolio** and, like most of the fragrance profiles on the market, are characterized **by well-known fragrances** that are familiar to children with a **dash of creativity**.

The concept is rounded off by suitable **botanical extract** suggestions, which are often used in **skin care** products.





# Sea Horse

## 6600553 Supreme Flowers

Top: fresh, apple, violet  
Heart: floral, lily of the valley, cyclamen  
Base: creamy, vanilla, musk, cedar

Botanical Extract:  
0485723 Botanical Violet Gly

Colour Recommendation:  
light pink, light green

You can  
do it!





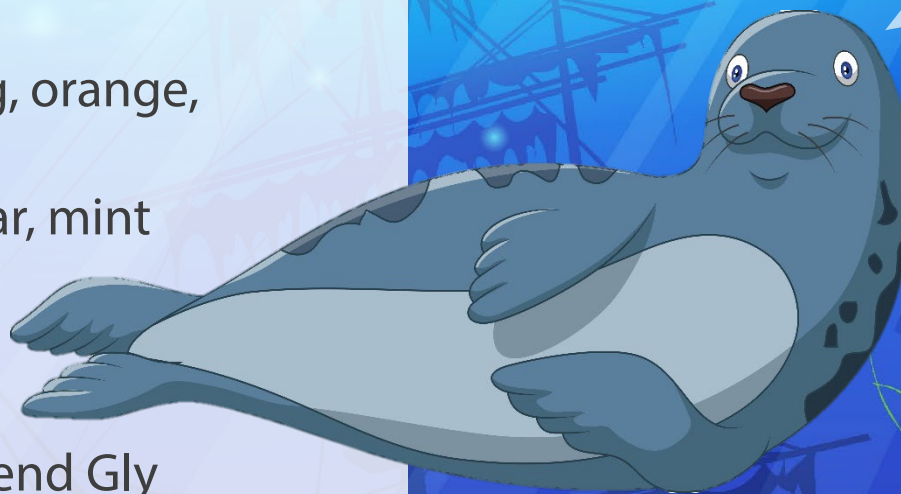
# SEAL

## 6101508 Jungle Shower

Top: aldehydic, sparkling, orange,  
ginger, melon  
Heart: herbal, woody, cedar, mint  
Base: ambery, amber

Botanical Extract:  
2310005 Mango - Orange Blend Gly

Colour Recommendation:  
blue



Let yourself  
go!





# STARFISH

## 6101636 Mango & Shea

Top: fruity, mango, passionfruit  
Heart: floral, creamy, coconut, jasmine  
Base: powdery, musk

Botanical Extract:  
2340084 Botanical Coconut Gly (org)

Colour Recommendation:  
orange

For me, you  
are the star!





# DOLPHIN

## 0815962 Watermelon Fantasy

Top: watery, green, fruity  
Heart: fruity, waterlily, cyclamen,  
watermelon, lily of the valley  
Base: fruity, sweet, musk

Botanical Extract:  
2340000 Botanical Watermelon Gly

Colour Recommendation  
pink, rose

Be brave  
and  
curious!





# BLUE WHALE

## 0807928 White Chocolate & Raspberry LS

Top: rhubarb, white chocolate

Heart: violet, peach, rose

Base: raspberry, caramel

Botanical Extract:

0486720 Botanical Raspberry Gly

Colour Recommendation:

beige, chocolate-like

*Take your  
time!*





# PUFFERFISH

## 0801734 Blackberry Yoghurt

Top: fruity, sweet, blackberry,  
blueberry, red berries  
Heart: creamy, dry fruit, yoghurt  
Base: sweet, creamy, vanilla

Botanical Extract:  
0486720 Botanical Raspberry Gly

Colour Recommendation:  
blackberry-like, creamy

You are  
awesome!





# OCTOPUS

## 6400046 Ice Candy

Top: fresh, cool, banana, pineapple  
Heart: fruity, slightly floral, mint, peach  
Base: sweet, vanilla, musk

Botanical Extract:  
0485837 Botanical Mentha Aquatica Gly

Colour Recommendation:  
turquoise, aqua

Keep cool!





# TURTLE

## 6800305 Sensivesse

Top: green, leaf green, cyclamen  
Heart: creamy, cosmetic, geranium  
Base: woody, caring, cedar, musk

Botanical Extract:  
2310032 Chlorophyll Extract Gly (org)

Colour Recommendation:  
white, light green

Don't  
rush me!





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# Contact

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