

High Ridge Brands

# 2019 Hair Care Line Review

**Presentation to**  
Date

# Agenda

Past

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Champions Of Value

Now

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Crafting Extraordinary  
Experiences For The Savvy  
Consumer



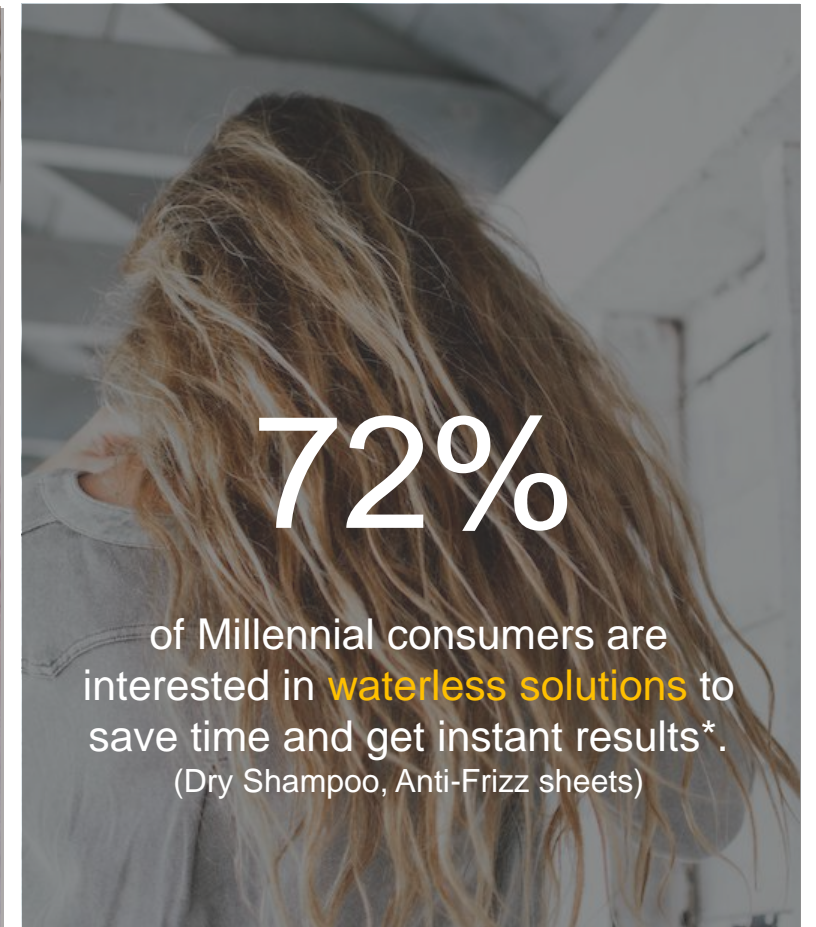
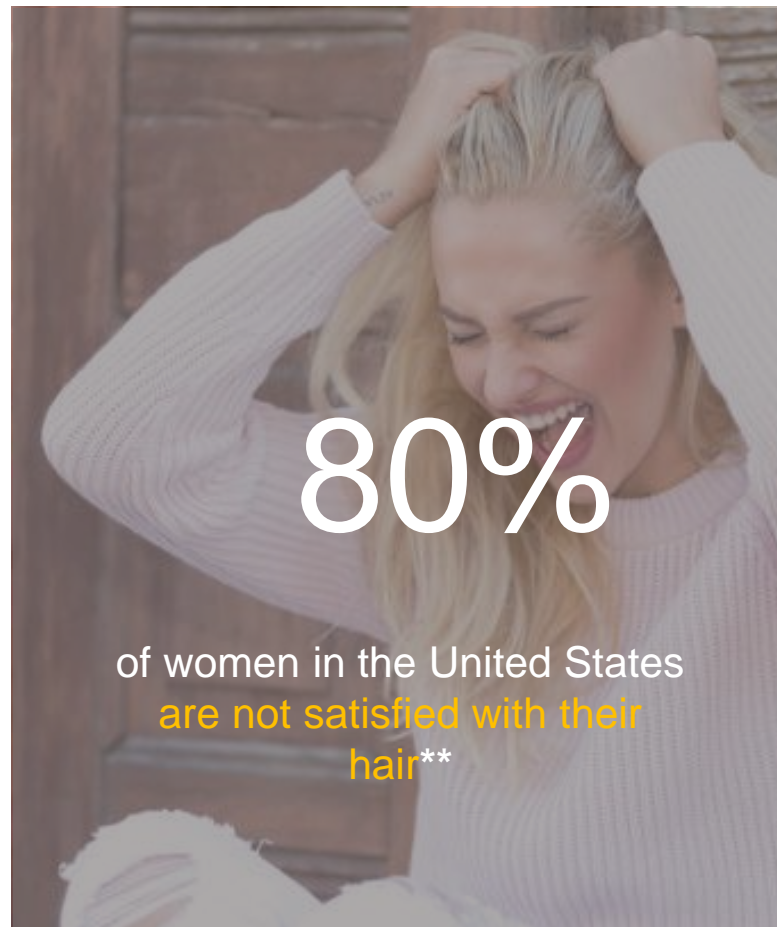
## The New Normal

## Our Mission



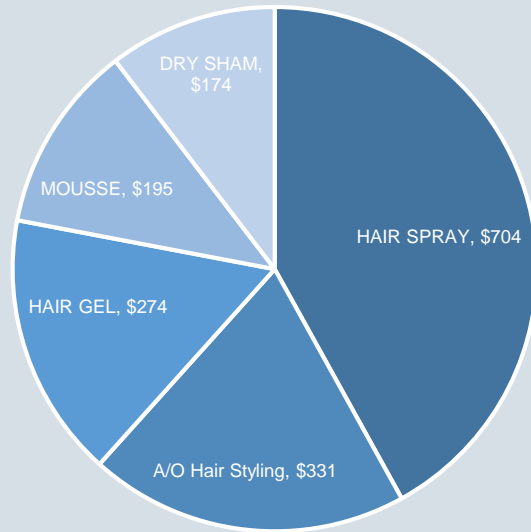
Bring our consumer  
a premium brand experience at  
a mass value price point.

# Hair Care Trends & Insights



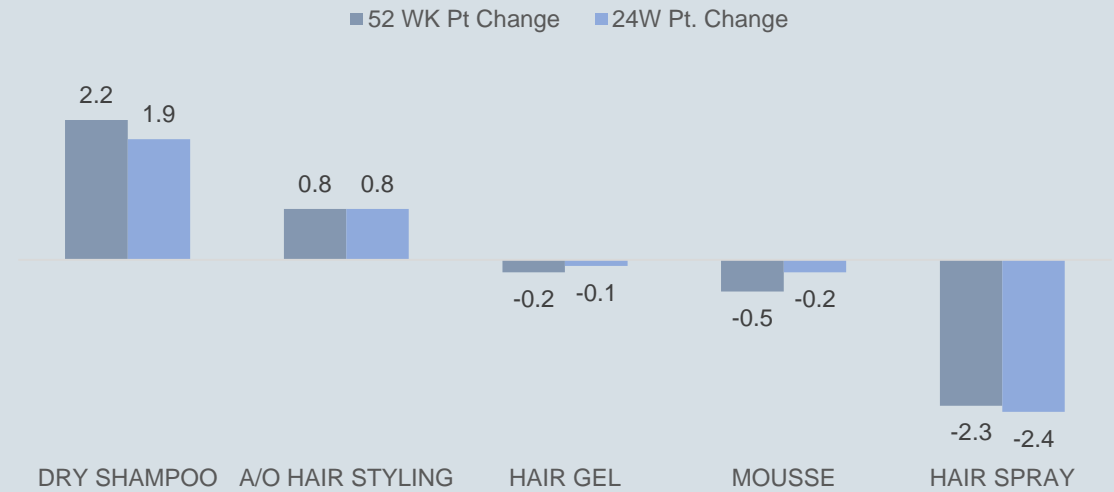
# Hair Styling Category Trends

## Segment Size & Dollar Share of Category (\$Ms)



Hairspray overwhelms category with 42% share

## Segment Share Pt. Change vs YAG



However, Hairspray is facing significant contraction while Dry Shampoo is experiencing rapid growth.

# Dry Shampoo & Hair Styling Category Development

Combined, these categories total **\$1.7B** and **+1% vs YAG**

Despite being the largest category, **Hairspray** continues to contract as the styling segment fragments through new product forms and innovation.

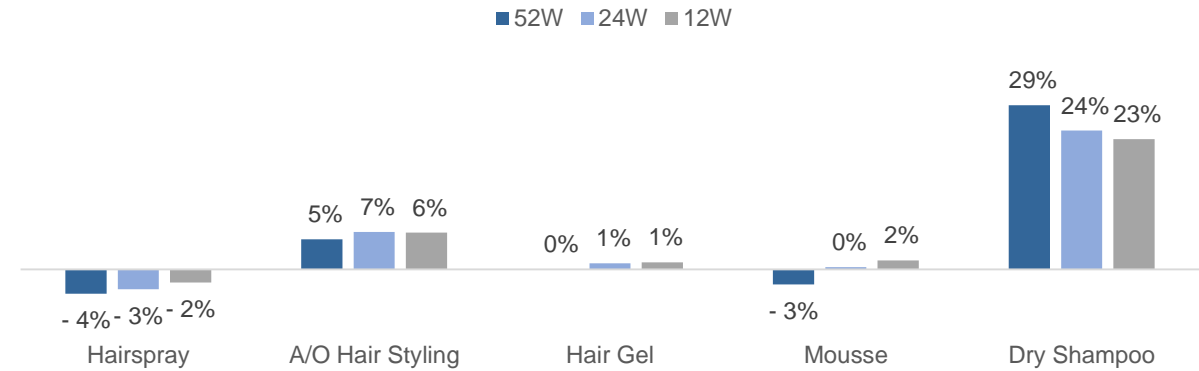
**Dry Shampoo** experiencing significant growth vs YAG as it's dollar share has grown from 9.2% to 11.0% in L12W.

**A/O Hair Styling** continues to outperform vs YAG driven by styling creams driven by consumer shift to embracing their natural texture.

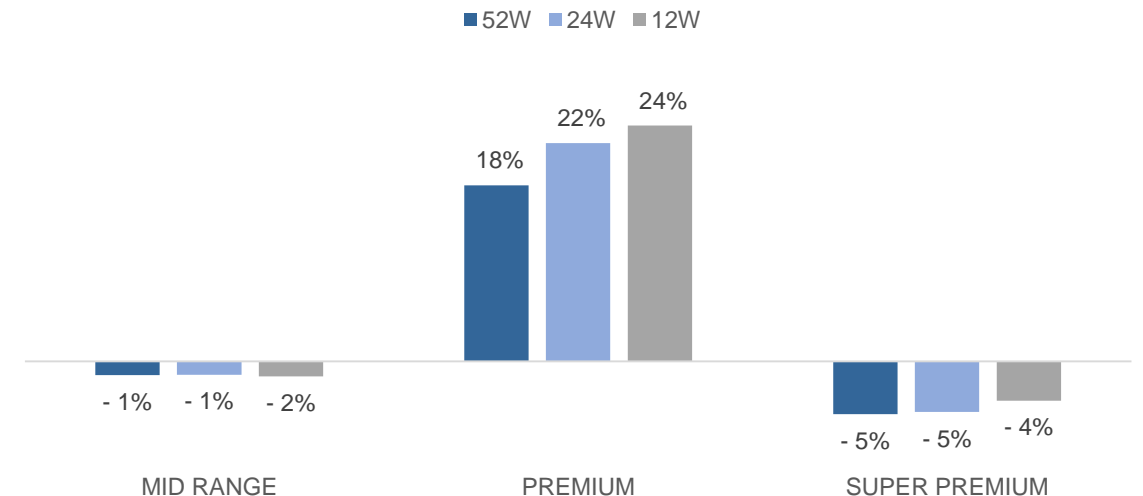
The **Premium Price Tier** is carrying these categories with an average non-promoted price point of \$5.50.

The main brands in this price tier are **OGX, Cantu, Not Your Mother's, Shea Moisture** and **L'Oreal Ever/Elvive**.

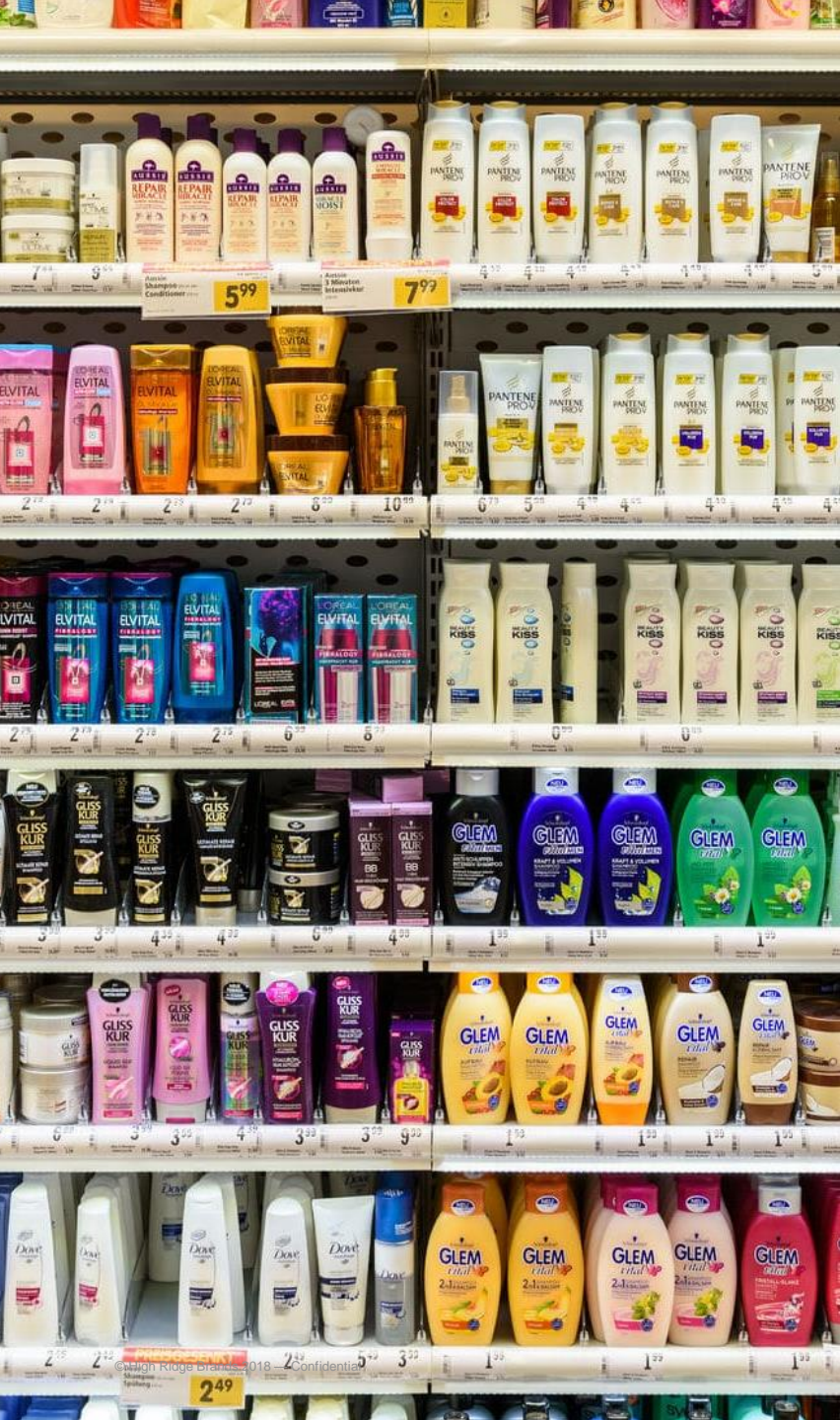
Dry Shampoo & Hair Styling \$ % CYA



Dry Shampoo & Hair Styling Price Tier \$ % CYA







The Opportunity



THE FUTURE

**SGX  
NYC**



Inspired by the driven women of New York City – chic, smart and sexy in their own skin – our team of Salon Grafix stylists dreamed up a cast of cutting-edge hair formulas to deliver of-the-moment looks that capture how you want to feel when your hair fits your life (no fuss required).

**SALON TESTED.  
NYC APPROVED.**



## The SGX NYC Stylists

Led by three-time North American Hairdresser Award winner, Frank Rizzieri, a hand-picked team of stylists are developing our consumer looks, creating step-by-step content and testing the products.



VIDEO



## The SGX NYC Woman

Millennials, 24 - 35 years old.

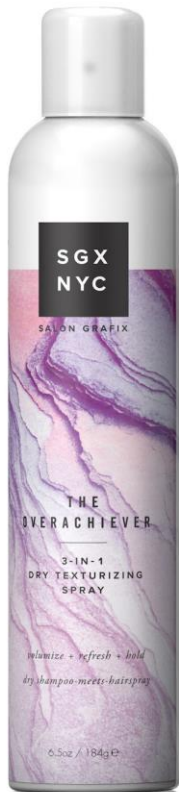
Super busy with kids, work, family, and life.

Looking for fast, simple solutions that WORK.

Finds products wherever she can: Walmart, Amazon, Sephora, Ulta, Walgreens, Target.

Learns about the latest products from friends-in-the-know, family, and bloggers she loves.





Texturizing Sprays

Dry Shampoos

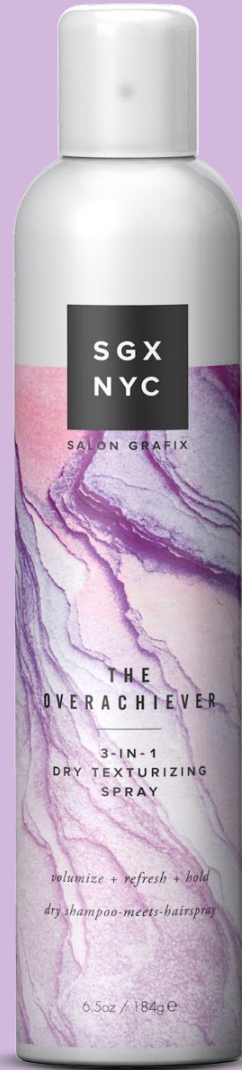
Curl-Enhancing

Finishing



# Texturizing Sprays





## The Overachiever

### 3-in-1 Dry Texturizing Spray

Innovative and lightweight, this do-it-all texturizing spray delivers oil absorption for instant freshness and volume while providing pliable hold allowing for movement throughout the day.



## The Bodyguard

### Protective Texturizing Spray

Delivering 450° thermal protection to prevent damage to the hair cuticle from heat damage allowing for superior manageability and comb-through. Finished hair has a healthy-looking shine.



## The Piece-Maker

### Beachy Texturizing Spray

Humidity resistant, this formula adds flexible layers to flat hair building build dimension and separation for enviable undone, piecey beach hair with a touch of shine.

# Dry Shampoos

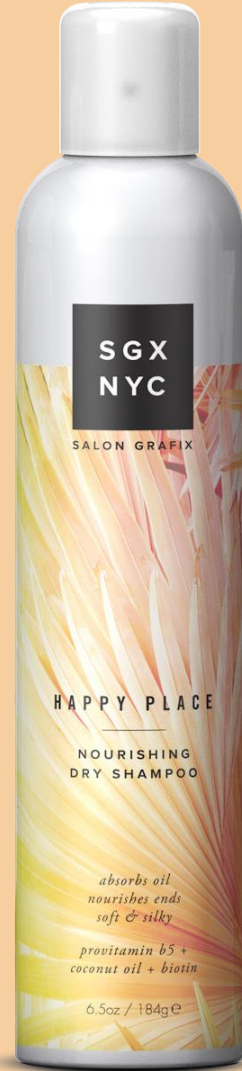




## Dry touch

### Volumizing Dry Shampoo

Instantly refresh and add volume to flat or fine hair. Infused with sea botanicals and bamboo extracts for their volumizing properties. Finished hair has a fresh, green scent that leaves you wanting more.



## Happy Place

### Nourishing Dry Shampoo

Get island-fresh hair with coconut oil, provitamin B5 and biotin for finished hair that is soft and silky with an intoxicating green-coconut scent.

# Curl Enhancing







## Curl Power

### Nourishing Curl Cream

Humidity resistant and lightweight formula delivers curl control and retention adding definition to flat or frizzy hair.



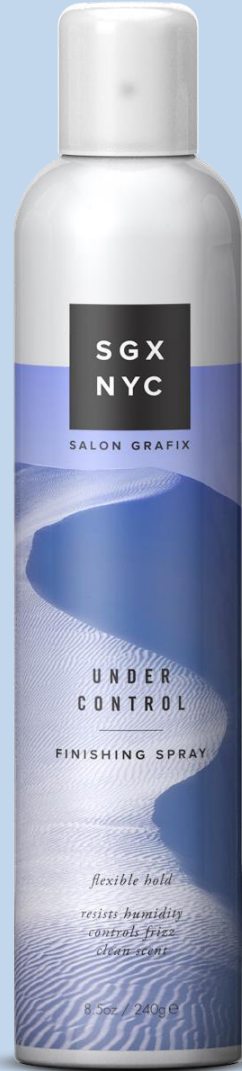
## So Whipped

### Whipped Mousse

Weightless hold and conditioning helps control frizz and flyaways. This creamy-whipped formula is the perfect foundation for enhancing curls or adding volume to flat hair.

# Finishing





## Under Control

### Flexible Hold Finishing Spray

The final touch to set long-lasting style without the traditional stiffness. Flexible hold by design, this formula tames frizz and flyaways with a clean scent.



SGX  
NYC

SALON GRAFIX

THE  
MUSTARD

RESTORATIVE  
CONDITIONING SHAMPOO

SGX  
NYC

SALON GRAFIX

HAPPY PLACE

NOURISHING  
DRY SHAMPOO

absorbs oil  
nourishes ends  
soft & silky

pro-vitamin b5 +  
argan oil + biotin

6.3oz / 184g e

SGX  
NYC

SALON GRAFIX

CURL POWER

NOURISHING  
CURL CREAM

define + shine

enhance moisture  
smooth & detangle

8.1oz / 237 ml

SGX  
NYC

SALON GRAFIX

HAIR  
CONTROL

RESTORATIVE SHAMPOO

SGX  
NYC

SALON GRAFIX

SGX  
NYC

SALON GRAFIX

BOUNCE BACK

CURL REFRESHING  
MIST

revive + nourish  
enhances curls & waves  
resists humidity  
lightweight hold

8fl oz / 236ml e

SGX  
NYC

SALON GRAFIX

THE  
PROTECTOR

RESTORATIVE  
CONDITIONING SHAMPOO

# Powerful Research Results

## Laboratory Benchmarking



**SGX NYC** performed either at parity or **surpasses salon brand formulations** when compared on key attributes in subjective laboratory testing.

## Concept & Packaging



Consumers helped confirm that the **SGX NYC** concept and product mix were on-trend, unique and differentiated from existing brands.

## Blinded Consumer Use



When blind, consumers tested **SGX NYC** against our key benchmarks and results were parity or better.

When pricing and packaging were shown, **SGX NYC was significantly favored.**

## Shelving & Findability



Despite being a new brand to market, **consumers had no issues finding SGX NYC on-shelf** when asked to compare against established market leaders.

# Benchmarking

Tested our top innovation against hairdresser-trusted salon brands.

## Dry Shampoo



R+Co Death Valley Dry Shampoo



SGX NYC Volumizing Dry Shampoo

### Primary Consumer Benefits

Cleansing, Volume & Residue-Free

### Results

**SGX NYC** delivers excellent cleansing and superior volume with a smooth on-hair feel without any leftover residue.

## Dry Texturizing Spray



Oribe Dry Texturizing Spray



SGX NYC 3-in-1 Dry Texturizing Spray

### Primary Consumer Benefits

Volume, Cleansing, Hold & Humidity Resistance

### Results

**SGX NYC** delivers superior volume and humidity resistance with a smooth brush out.

## Beachy Texturizing Spray



IGK Beach Club Texture Spray



SGX NYC Beachy Texturizing Spray

### Primary Consumer Benefits

Beachy Waves, Humidity Resistance

### Results

**SGX NYC** delivers longer-lasting style throughout the day with excellent humidity resistance.

# Consumer Trade-Up Strategy

Consumers claim they would switch from lower priced Pantene and TRESemme to SGX NYC.

**A** General Population  
N = 97

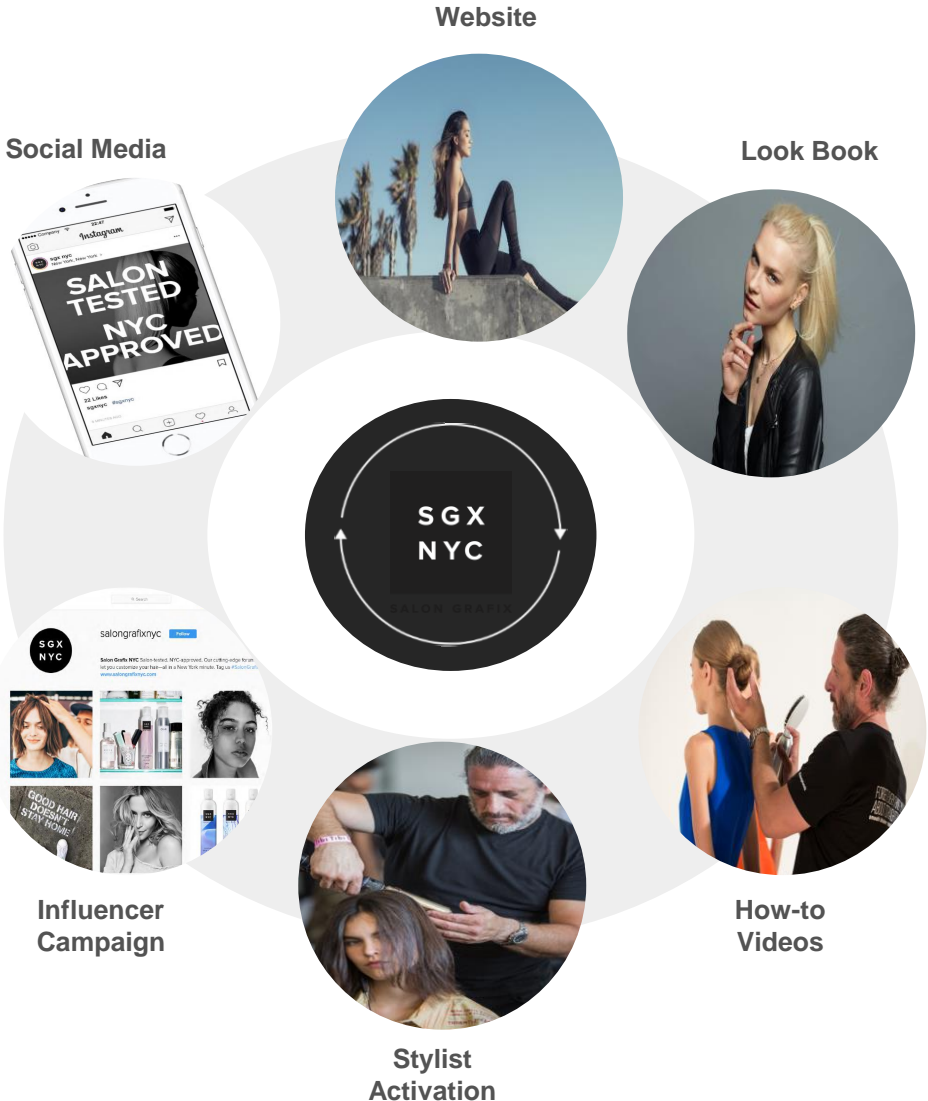
Pantene	16%	Above 'Fair Share'
TRESemmé	12%	Above 'Fair Share'
Aussie	9%	Above 'Fair Share'
Garnier Fructis	7%	Above 'Fair Share'
göt2b	5%	
Herbal Essences	5%	
Suave	4%	
A/O Styling brands	42%	

29% of General Population Styling Aid Buyers expect to purchase SGX NYC 'in addition to' the hair care products they currently use—providing an incrementality opportunity.



# National Marketing Support

# Customer Support



# SGX NYC SKU Recommendation

## \$XXM Opportunity (\$XXM Profit)



3-in-1  
Dry Texturizing  
Spray

Protective  
Texturizing Spray

Volumizing  
Dry Shampoo

Finishing Spray

Whipped  
Mousse

Nourishing  
Dry Shampoo

Nourishing  
Curl Cream

Beachy  
Texturizing Spray

Cost: \$

Price: \$

Margin:

# Placement

Merchandise SGX NYC line together to maximize innovation for multiple hair style occasions and needs.

Place SGX next to Salon-Styling brands and adjacent to the Dry Shampoo block to appeal to savvy shoppers seeking on-trend styling products typically found in Ulta and Sephora.

Trade Up from lower priced mainstream styling brands SGX NYC innovation.

*Insert a picture of the customer planogram with SGX NYC items super-imposed where they should be merchandised. Please consult with Chad/Lisa prior to finalization.*

# Summary

Sales Director to Fill Out

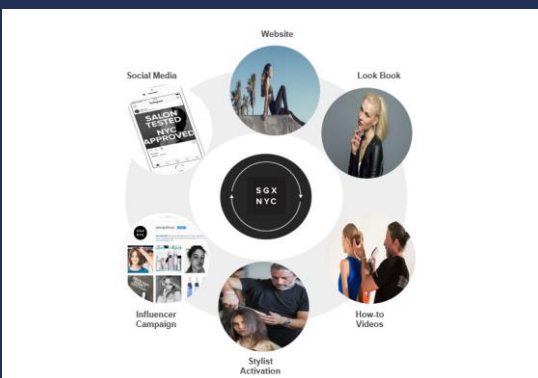


The Future

Salon-Tested & Consumer Approved

Strategy & Support

Financial Opportunity



**SGX NYC**, a premium hair styling brand experience delivering on-trend innovation at an affordable price point.

**On-trend superior formulations** versus top-tier and premium brand benchmarks to ensure performance

**National digital promotion and sampling** through social media platforms and influencers to drive trial and awareness

**Financial Opportunity**

# APPENDIX

# Research Methods

## Laboratory Benchmarking



Conducted subjective laboratory testing to **ensure superior product performance** versus premium and salon brands

## Concept & Packaging



Evaluated SGX NYC conceptual approach, value perception and packaging to **measure consumer interest and acceptance.**

## Blinded Consumer Use



Obtain consumer feedback on product performance, packaging and pricing compared against **top-selling salon brands**

## Shelving & Findability



Simulate real-life POG layouts to understand **placement and findability**

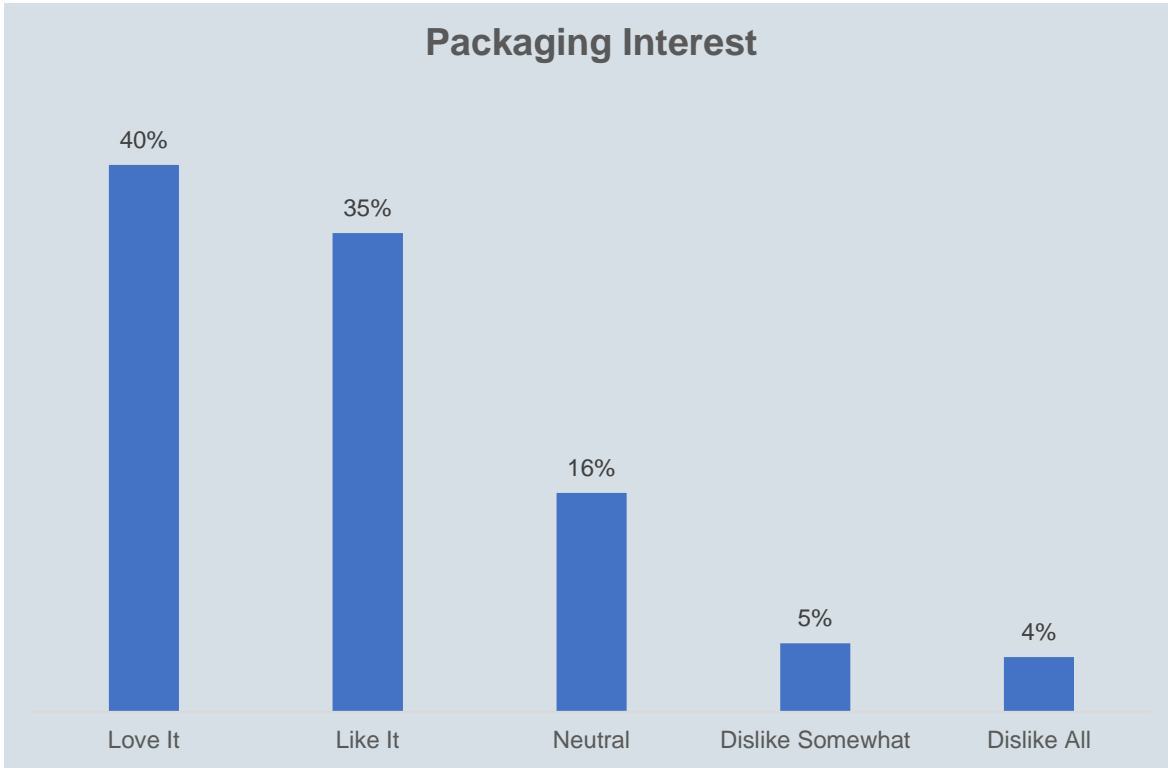
# Concept & Packaging Results

With a sample size of ~500 respondents with women:

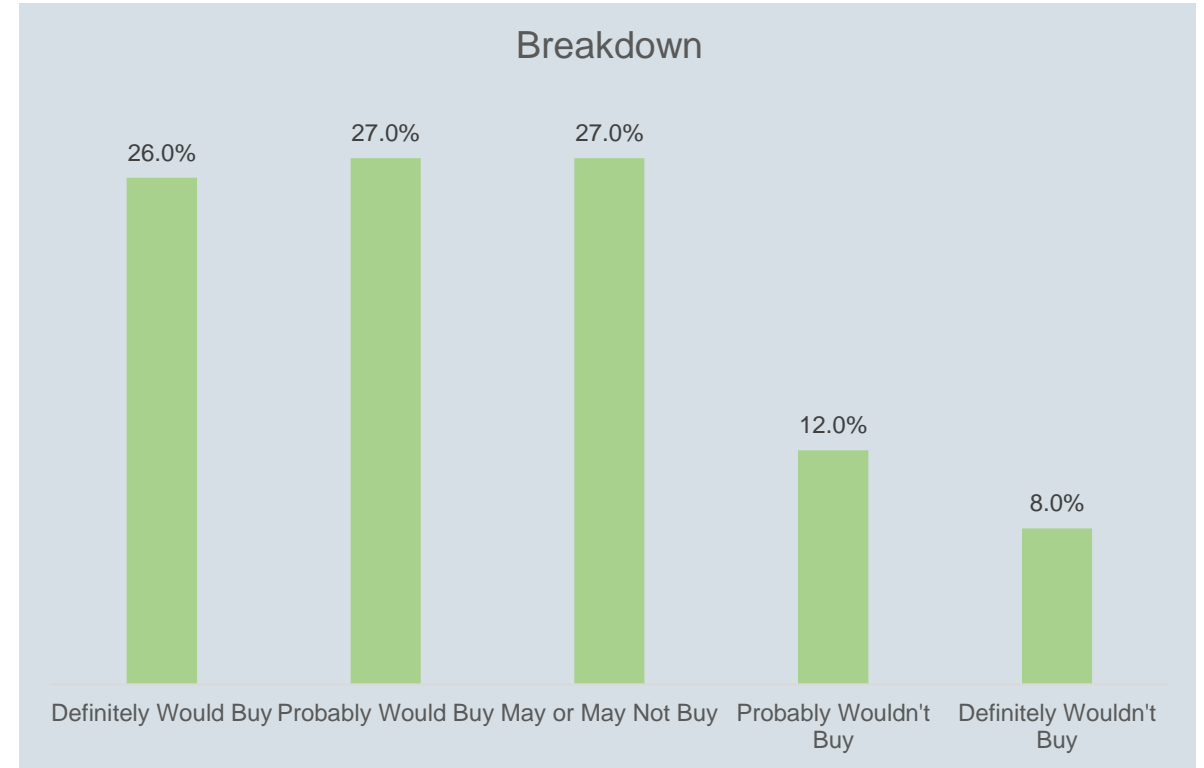
18-45 years old

Use styling products 2-3 per week

## Packaging Interest



## Breakdown



**SGX NYC** surpassed Purchase Interest benchmark results based on +3,500 Global CPG Companies\*

# Blinded Consumer Use Test – Dry Shampoo

Obtain consumer feedback on hero products compared to key competitive benchmarks.

n = 30

## Blinded Results

Consumers slightly prefer R+Co  
versus SGX NYC





# Blinded Consumer Use Test – Dry Shampoo

Obtain consumer feedback on hero products compared to key competitive benchmarks.  
n = 30

## Usage + Pricing & Packaging Results

**SGX NYC** significantly favored over R+Co with consumers having a better on-hair feel experience.



28%

\$30.00	8.5oz
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72%

\$6.98	6.5oz
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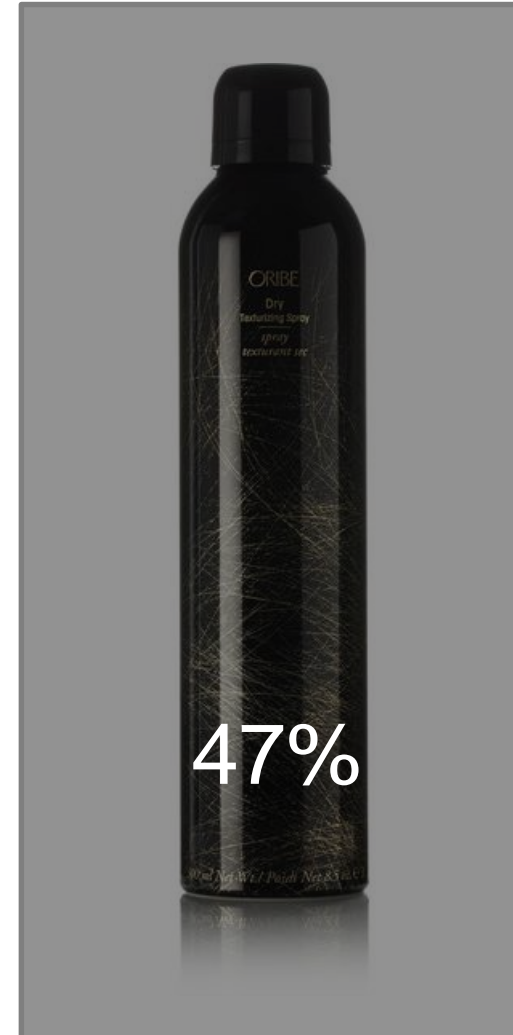
# Blinded Consumer Use Test – Dry Texturizing Spray

Obtain consumer feedback on hero products compared to key competitive benchmarks.

n = 30

## Blinded Results

Consumers slightly prefer SGX NYC over Oribe



# Blinded Consumer Use Test – Dry Texturizing Spray

Obtain consumer feedback on hero products compared to key competitive benchmarks.

n = 30

## Usage + Pricing & Packaging Results

**SGX NYC** significantly favored over Oribe with SGX NYC having a softer on-hair feel and better style control



# Blinded Consumer Use Test – Dry Texturizing Spray

Obtain consumer feedback on hero products compared to key competitive benchmarks.

n = 30

## Blinded Results

Consumers slightly prefer IGK over SGX NYC



# Blinded Consumer Use Test – Dry Texturizing Spray

Obtain consumer feedback on hero products compared to key competitive benchmarks.

n = 30

## Usage + Pricing & Packaging Results

**SGX NYC** significantly favored over IGK with consumers preferring the fragrance and ability to create beachy-looking waves.



\$29.00

5.0oz.



\$6.98

6.5oz

# Shelving & Findability

Evaluate consumer reaction to new SGX NYC package design when seen on a shelf in real life.

n = 30 (per shelf)

Women, ages 18-55

Use styling products 2-3 times per week



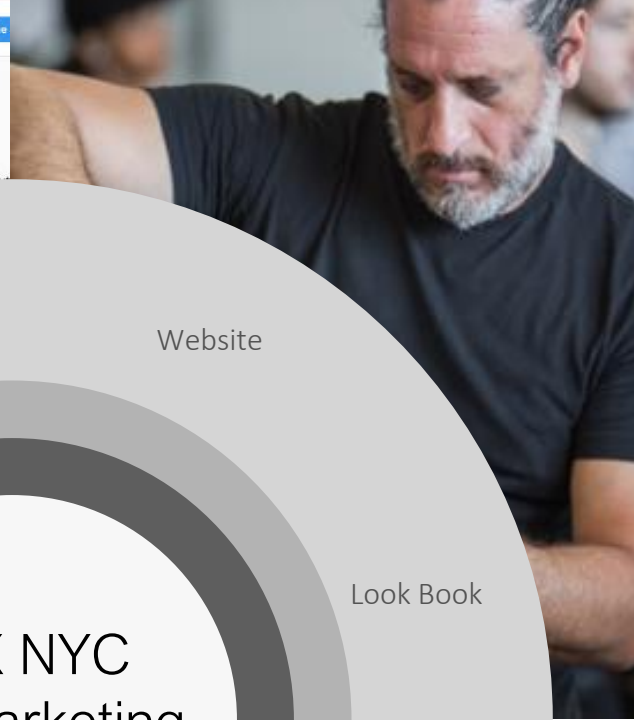
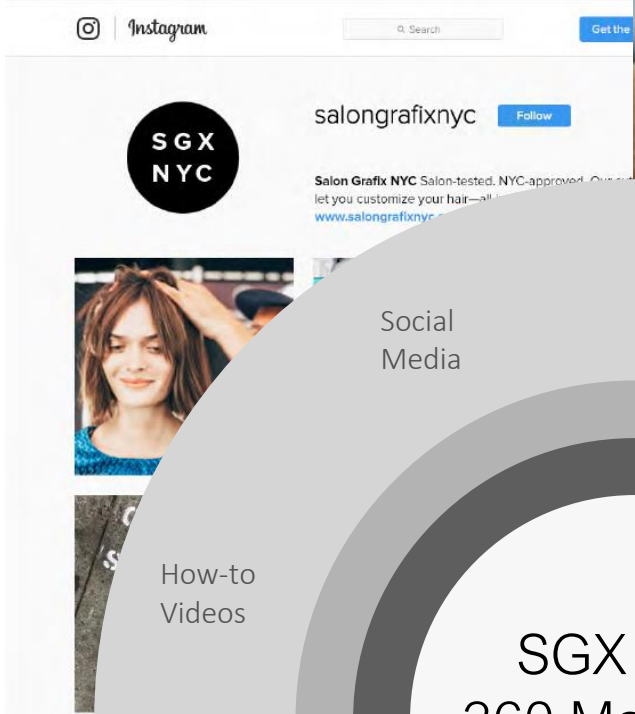
## Key Findings & Results

Brand blocking maximized overall shelf impression

Despite being a new brand, consumers had no issues finding SGX on-shelf when compared against established market leaders

Logo & Packaging help differentiate and stand out

Consumers found SGX NYC to be just right for size and price



appendix



**Formula Description:**

A lightweight texture-enhancing formula with 450 degree thermal protection that makes the product okay to use with hot tools (curling iron, flat iron) that helps put the finishing touch of already styled hair.

Excellent humidity resistance.

**Less than 1% starch to enhance piecey texture and add grip**

**When She Would Use:**

On clean, dry hair for a flexible finish without a traditional crunchy hairspray hold.

**Fragrance:**

SGX's signature fragrance, **Chasing Shine**, a fresh floral green enveloping scent with notes of fresh freesia, jasmine and cedarwood. Indulgent yet refreshing.

**Formulated With:**

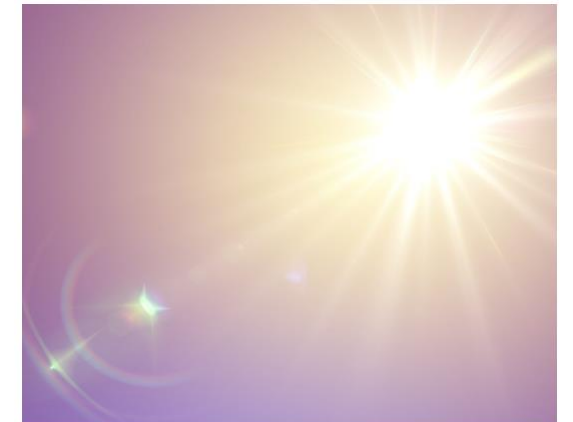
**DynamX Polymer** provides increased thermal protection up to 450 degrees. The DynamX acts to protect the hair cuticle without blistering or other heat-damage related issues.

**Formulated Without:**

Parabens, Phthalates, Petrolatum, Sulfates, Mineral Oil. Gluten-Free, Vegan-Friendly, Cruelty-Free



Protective Texturizing Spray



**Formula Description:**

Humidity resistant formula with polymers to help cluster/bunch hair strands together to deliver that piecey, beach texture with a soft sheen finish.

**When She Would Use:**

On clean, dry or towel-dried hair when she wants that beachy look without having to go to the beach.

**Fragrance:**

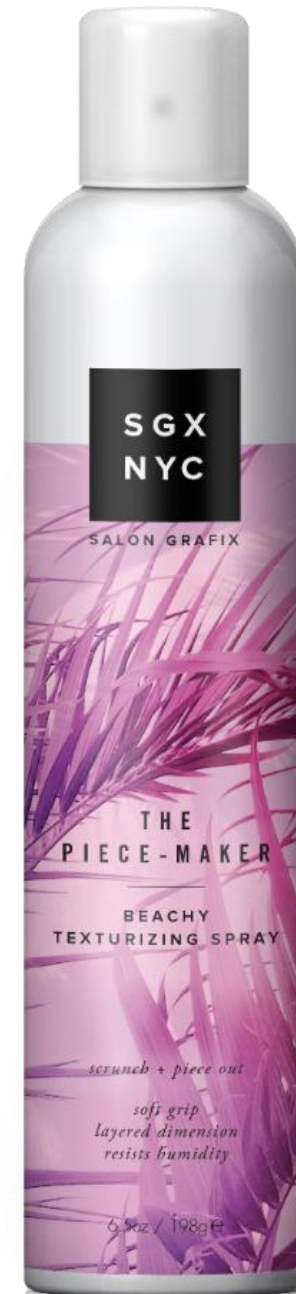
**Coconut Milk**, a fresh, creamy coconut scent that makes you feel like your on a tropical island.

**Formulated With:**

Sea salt extract **is known to help provide texture and hold**, sea kale, red seaweed extract **all are known as cleansers that help remove gunk without drying out the hair**

**Formulated Without:**

Parabens, Phthalates, Petrolatum, Sulfates, Mineral Oil. Vegan-Friendly, Cruelty-Free



Beachy Texturizing Spray



**Formula Description:**

Instantly refreshes hair with absorbing oil from roots while enhancing volume.

**Starch Levels in Products:**

Contain proprietary blend of 8% starches.

SGX beat Benchmarked brand R+Co's Death Valley Dry Shampoo by having superior cleaning an on-hair feel due to our modified blend of starches.

- Starch 1: High performance modified corn starch. It is an effective oil absorber that mitigates greasiness on the hair and scalp.
- Starch 2: Aluminum-Free modified tapioca starch. Ideal for reducing greasiness in the oiliest formulations. Delivers a soft, silky and conditioned after-feel to the hair and scalp.

**When She Would Use:**

On second-day hair, to extend her salon blowout or add a boost of freshness.

**Fragrance:**

SGX's signature fragrance, **Chasing Shine**, a fresh floral green enveloping scent with notes of fresh freesia, jasmine and cedarwood. Indulgent yet refreshing.

**Formulated With:**

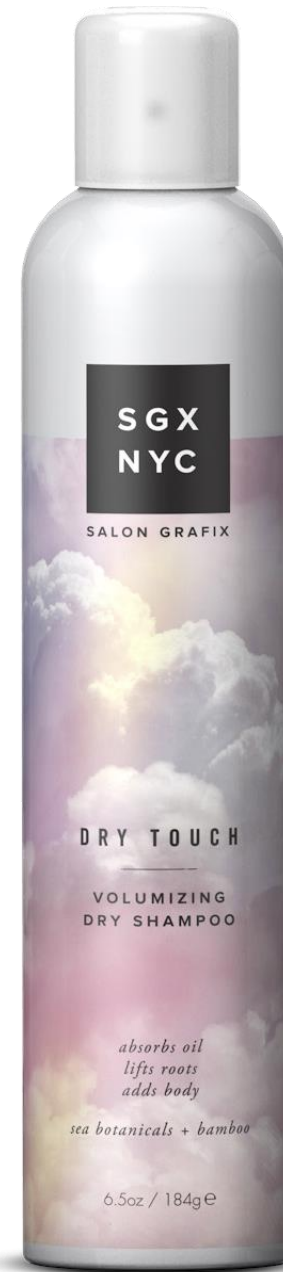
**Red Algae & Seaweed Extracts** which is known as a cleanser and for removing gunk/build-up from hair without drying hair

**Bamboo Fibers:** is known for it's volumizing properties

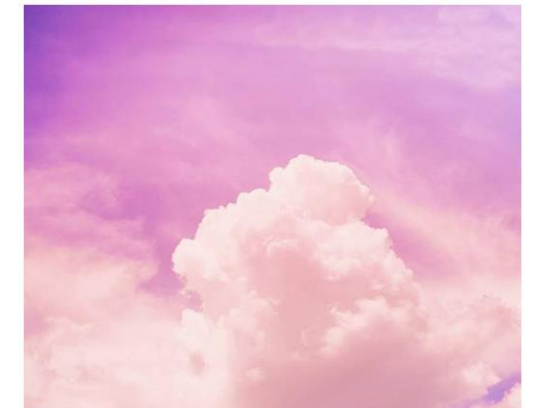
**White Ginger Extract** is known for it's cleansing properties

**Formulated Without:**

Parabens, Phthalates, Petrolatum, Sulfates, Mineral Oil. Vegan-Friendly, Cruelty-Free



Volumizing Dry Shampoo



**Formula Description:**

Instantly refreshes hair with absorbing oil from roots while enhancing volume. Modified starches help provide soft, smooth on-hair finish.

**Starch Levels in Products:**

Contain proprietary blend of 8% starches.

SGX beat Benchmarked brand R+Co's Death Valley Dry Shampoo by having superior cleaning an on-hair feel due to our modified blend of starches.

- Starch 1: High performance modified corn starch. It is an effective oil absorber that mitigates greasiness on the hair and scalp.
- Starch 2: Aluminum-Free modified tapioca starch. Ideal for reducing greasiness in the oiliest formulations. Delivers a soft, silky and conditioned after-feel to the hair and scalp.

**When She Would Use:**

On second-day hair, to extend her salon blowout or add a boost of freshness.

**Fragrance:**

**Coconut Milk**, a fresh, creamy coconut scent that makes you feel like your on a tropical island.

**Formulated With:**

**Provitamin B5 (or Panthenol)** for it's nourishing properties

**Coconut Oil** for it's nourishing benefits and helps deliver smooth feel

**Biotin** is known for it's ability to help protect and strengthen hair

**Formulated Without:**

Parabens, Phthalates, Petrolatum, Sulfates, Mineral Oil. Vegan-Friendly, Cruelty-Free



Nourishing Dry Shampoo



**Formula Description:**

A weightless styling foam with excellent conditioning, humidity resistant, and curl definition properties to help create and sculpt style.  
Enhances texture in naturally wavy or curly hair.

**When She Would Use:**

On clean dry or towel-dried hair to create or amplify natural curly texture.  
Works well with hot tools.

**Fragrance:**

**Velvet Lush**, a luxurious and indulgent fragrance with hints of vanilla and floral sweetness providing an extra sense of nourishment.

**Formulated With:**

**Provitamin B5 (or panthenol)** for it's nourishing properties  
**Bamboo Fibers** for it's strengthening and volumizing properties

**Formulated Without:**

Parabens, Phthalates, Petrolatum, Sulfates, Mineral Oil.  
Gluten-Free, Vegan-Friendly, Cruelty-Free



Nourishing Curl Cream



**Formula Description:**

A weightless styling foam with excellent conditioning, humidity resistant, and curl definition properties to help create and sculpt style.

Enhances texture in naturally wavy or curly hair.

**When She Would Use:**

On clean dry or towel-dried hair to create or amplify natural curly texture.

Works well with hot tools.

**Fragrance:**

**Velvet Lush**, a luxurious and indulgent fragrance with hints of vanilla and floral sweetness providing an extra sense of nourishment.

**Formulated With:**

**Provitamin B5 (or panthenol)** for it's nourishing properties

**Bamboo Fibers** for it's strengthening and volumizing properties

**Formulated Without:**

Parabens, Phthalates, Petrolatum, Sulfates, Mineral Oil. Gluten-Free, Vegan-Friendly, Cruelty-Free



Whipped Mousse



**Formula Description:**

A modern formula for an aging category, this hairspray has flexible hold that finishes styles without the traditional stiffness and all-day humidity resistance.

**When She Would Use:**

On dry, already styled hair

**Fragrance:**

SGX's signature fragrance, **Chasing Shine**, a fresh floral green enveloping scent with notes of fresh freesia, jasmine, and cedarwood. Indulgent yet refreshing.

**Formulated With:**

**Bamboo Fibers** for it's strengthening and volumizing properties

**Formulated Without:**

Parabens, Phthalates, Petrolatum, Sulfates, Mineral Oil.  
Gluten-Free, Vegan-Friendly, Cruelty-Free



Flexible Hold Finishing Spray

