

Claude3 Opus Sales Report
Hair Color 2, 2015 vs 2016
Prepared: 26 March 2024

This report uses charts designed according to the International Business Communication Standards (IBCS) to ensure clarity, consistency, and information density.

Key elements:

1. **Consistent chart design:** All charts follow a uniform design, making it easier for readers to understand and compare data across different visualizations. This includes consistent use of fonts, sizes, and positioning of elements.
2. **Simplified and focused content:** Charts are designed to be easily readable, with a focus on essential information. Unnecessary decorative elements are avoided to maintain clarity.
3. **Proper labeling and titling:** Each chart includes clear, descriptive titles and labels to ensure that the data is easily understood without additional context.
4. **Standardized notation:** IBCS-compliant charts use standardized notation for elements such as time periods, units, and scenarios, making the information more accessible and comparable.

The following conventions are used throughout the report:

- **Black** represents actual values for the current year
- **Grey** represents data from the previous year
- **Red** indicates negative or "bad" performance
- **Green** indicates positive or "good" performance
- **"PY"** is used to denote the previous year values
- **"AC"** refers to the actual current year values
- **Underscore "_"** is used to represent year-to-date data
- **Tilde "~"** indicates a rolling year or 12-month period

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Market Overview

In 2016, the hair color industry was dominated by Coty and L'Oréal, with cream products, permanent color, and dark shades like brown and black being the most popular among consumers. The market shifted towards cream and powder products in sachets and kits, with perfumeries showing strong potential across various colors. Purchasing behaviors varied between segments, indicating a dynamic and evolving market.

Sales Performance

Pharmacies led the hair color market, with consumers preferring long-lasting, lower-priced permanent cream products in various shades. Hoyu Co Ltd Japan and other smaller companies experienced strong growth, while Coty and Henkel faced declining sales across many of their pack types. The Maxi-single pack type in the permanent category drove the highest sales volume and revenue.

Market Insights

Dark Brown and Light Blonde shades, along with Cream product forms, were the top performers in the 2016 hair color market. Lakme, Unilever, Coty, and L'Oréal commanded a highly concentrated market, with the top 25% of companies generating 80% of sales across just 16 key markets. While most companies offered at least three product forms, diversifying both product offerings and sales markets could help capture untapped consumer segments and reduce overreliance on core areas.

Growth Trends

The market grew modestly at 1.7% CAGR from 2015 to 2016, with units sold increasing faster, indicating a shift towards lower-priced products. Perfumeries and Large Groceries showed substantial growth of 17-22% CAGR, while the overall market expanded at 7.3% annually, driven by the 'Not Applicable' and 'Kits' subbrands. Smaller companies in the 'Other rank >5' category experienced the highest growth at 50.3% CAGR, while L'Oréal and Hoyu Co Ltd Japan demonstrated steady growth.

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At a glance: The hair color industry in 2016 was led by Coty and L'Oréal, with cream products, permanent color, and dark shades like brown and black being most popular. Sales grew through effective strategies, despite some forms declining, and the market shifted towards cream and powder products in sachets and kits. Perfumeries showed strong potential across colors, while purchasing behaviors varied between segments, indicating a dynamic market. Pages 8 to 15.

Sales breakdown: Pharmacies dominate the hair color market, with permanent cream products in various shades being the most popular among consumers. Hoyu Co Ltd Japan and other smaller companies are seeing strong growth, while Coty and Henkel struggle with declining sales across many of their pack types. The data suggests consumers prefer long-lasting, lower-priced cream hair color products, with the Maxi-single pack type in the permanent category driving the highest sales volume and revenue. Pages 17 to 29.

Data insights: The hair color market in 2016 was led by Dark Brown and Light Blonde shades, with Cream being the most popular product form. Lakme, Unilever, Coty and L'Oréal were the top performers, commanding a highly concentrated market where the top 25% of companies generated 80% of sales across just 16 key markets. While most companies offered at least 3 product forms, there may be opportunities to diversify both product offerings and sales markets to capture untapped consumer segments and reduce overreliance on a few core areas. Pages 31 to 42.

Trends: The market grew modestly at 1.7% CAGR from 2015 to 2016, with units sold increasing faster, suggesting a shift towards lower-priced products. Certain market segments like Perfumeries and Large Groceries showed substantial growth of 17-22% CAGR, while the overall market expanded at 7.3% annually, driven by the 'Not Applicable' and 'Kits' subbrands. Smaller companies in the 'Other rank >5' category grew the most at 50.3% CAGR, while Coty and Henkel saw sales declines, and L'Oréal and Hoyu Co Ltd Japan demonstrated steady growth. Pages 44 to 49.

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The hair color industry in 2016 was dominated by Cream products, primarily sold through Pharmacies, with Permanent hair color being the most popular (p.9). Coty and L'Oréal jointly held the majority market share, and Dark Brown, Light Blonde, and Black were the most sought-after colors (p.9). The hair color market grew from 2015 to 2016, mainly through effective units and mix strategies that made up for price reductions (p.10). However, the market saw a shift towards permanent hair color products, especially cream-based kits and powder sachets (p.12).

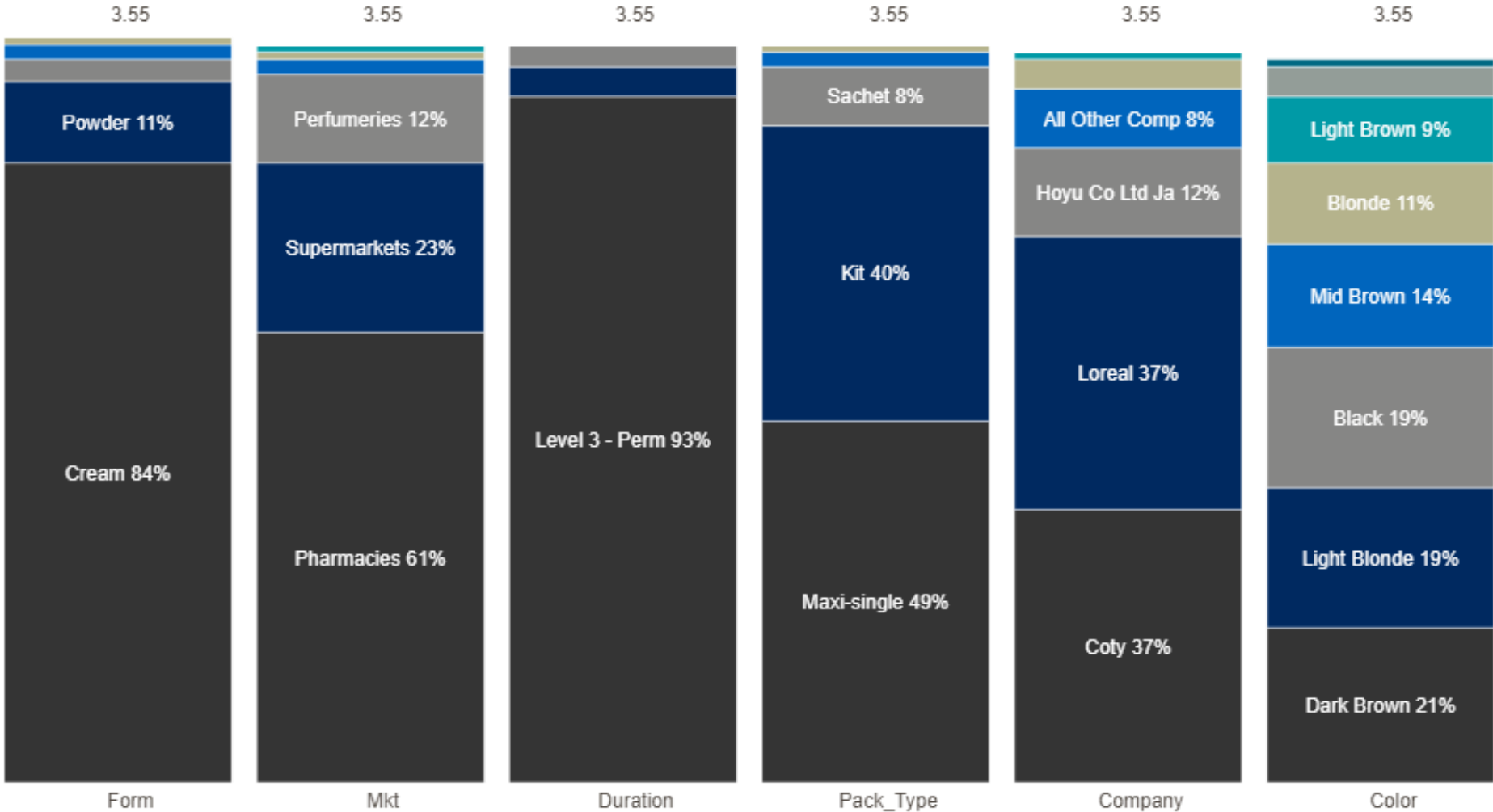
Cream and powder hair color products saw sales growth, boosted by higher units sold, better product mix, and increased prices for powder (p.11). However, mousse, gel, and liquid forms declined in sales, mainly due to fewer units sold, weaker product mix, and lower prices (p.11). The market grew in areas like Cream and Powder forms, Sachet packs, and Perfumeries, while Black and Dark Brown remained consistently popular with consumers (p.13).

Hair color sachet packs saw unit price growth, especially in large groceries and perfumeries, while supermarkets had declining unit prices for kit and other rank >3 pack types (p.14). Maxi-single and kit pack types performed variably but stably across markets (p.14). The market also saw a trend towards darker shades like Dark Brown and Black, which grew substantially in key segments (p.15).

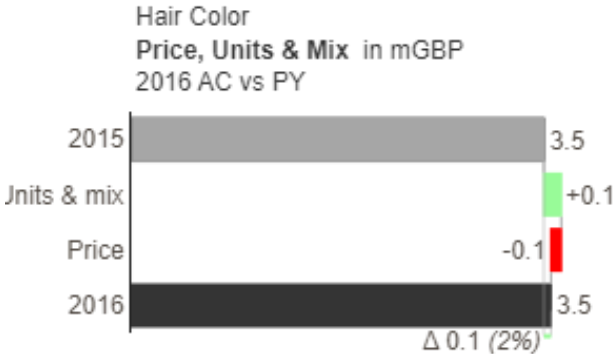
Perfumeries had strong growth across all colors, highlighting their importance, while Pharmacies had mixed results (p.15). Large Groceries and markets ranked below the top 4 showed potential for growth, despite lower sales than Supermarkets and Pharmacies (p.15). Consumer purchasing behaviors and preferences varied across segments, indicating a dynamic market (p.12, p.15).

In 2016, Cream products dominated the hair color industry, primarily sold through Pharmacies. Permanent hair color was most popular, with Maxi-single and Kit pack types being preferred. Coty and L'Oréal jointly held the majority market share. Dark Brown, Light Blonde, and Black were the most sought-after colors. There are opportunities for innovation in Cream and Permanent products, enhancing visibility in Pharmacies, and targeted marketing for the popular color ranges.

Hair Color
Sales in mGBP by dimension
2016

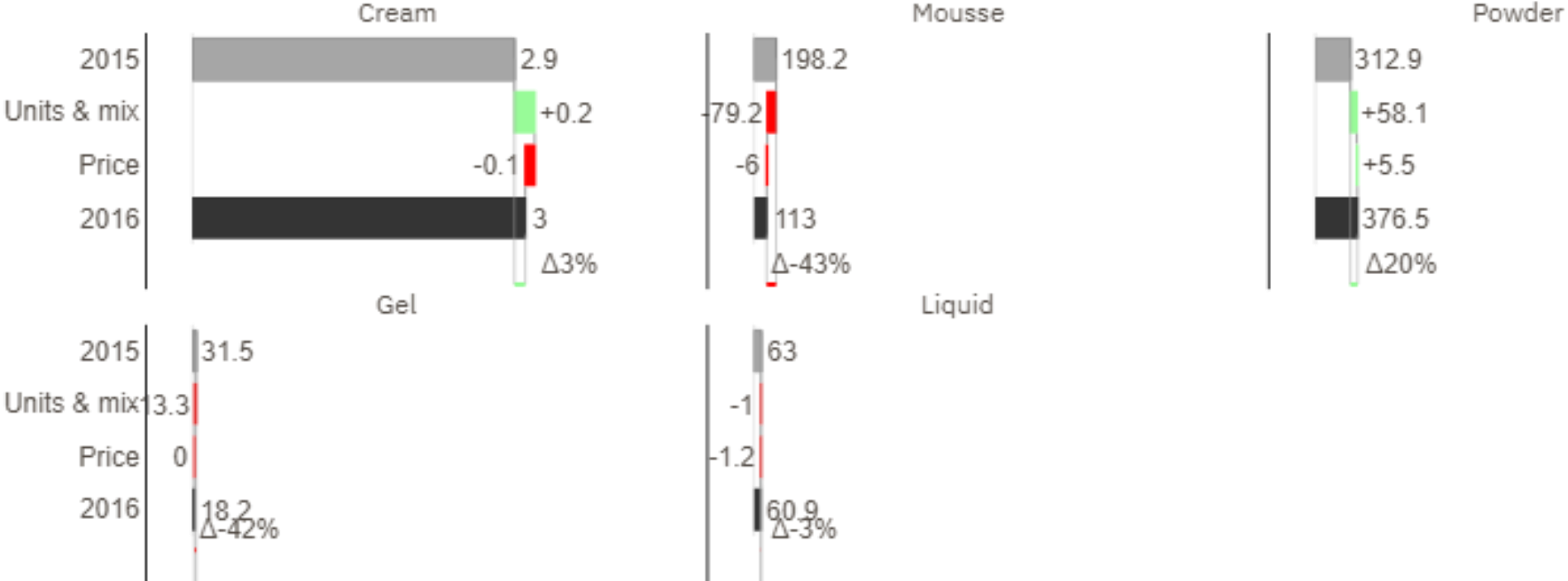


The market grew from 2015 to 2016, mainly through effective units and mix strategies that made up for price reductions. More units were likely sold or the product mix was more profitable in 2016. But the average selling price decreased, possibly due to price cuts or discounts. Still, overall sales growth was positive.

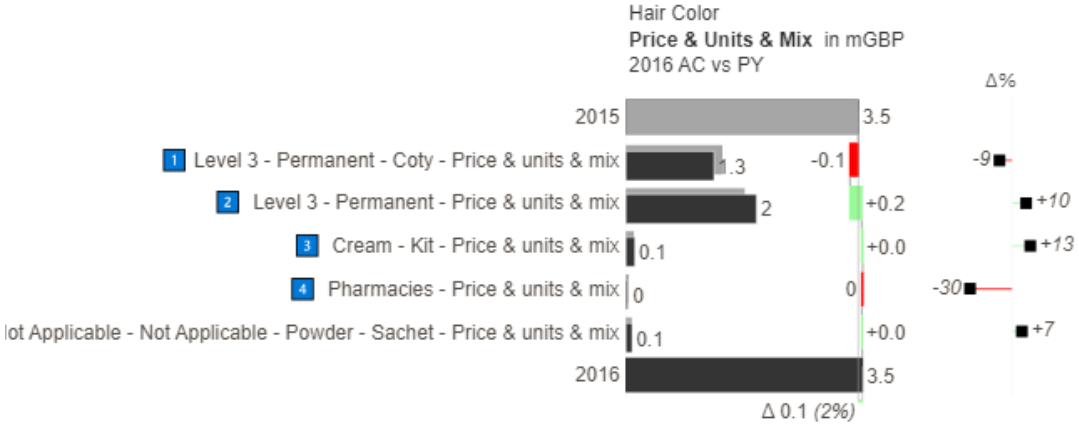


From 2015 to 2016, cream and powder hair color products saw sales growth, boosted by higher units sold, better product mix, and increased prices for powder. However, mousse, gel, and liquid forms declined in sales, mainly due to fewer units sold, weaker product mix, and lower prices. Companies should rethink plans for the struggling forms while leveraging the momentum of cream and powder through smart marketing and product mix strategies.

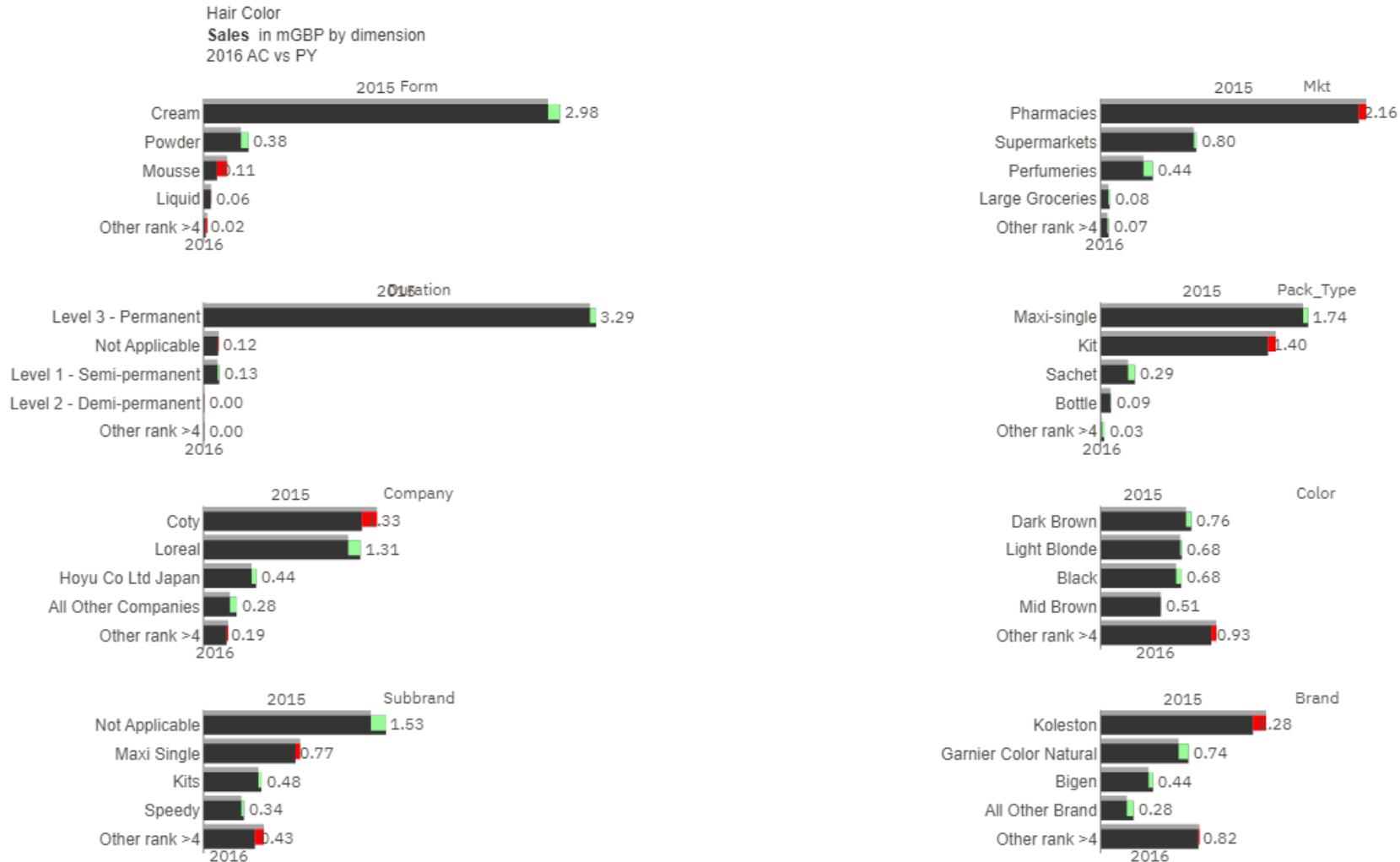
Hair Color
 Price, Units & Mix in kGBP by Form
 2016 AC vs PY



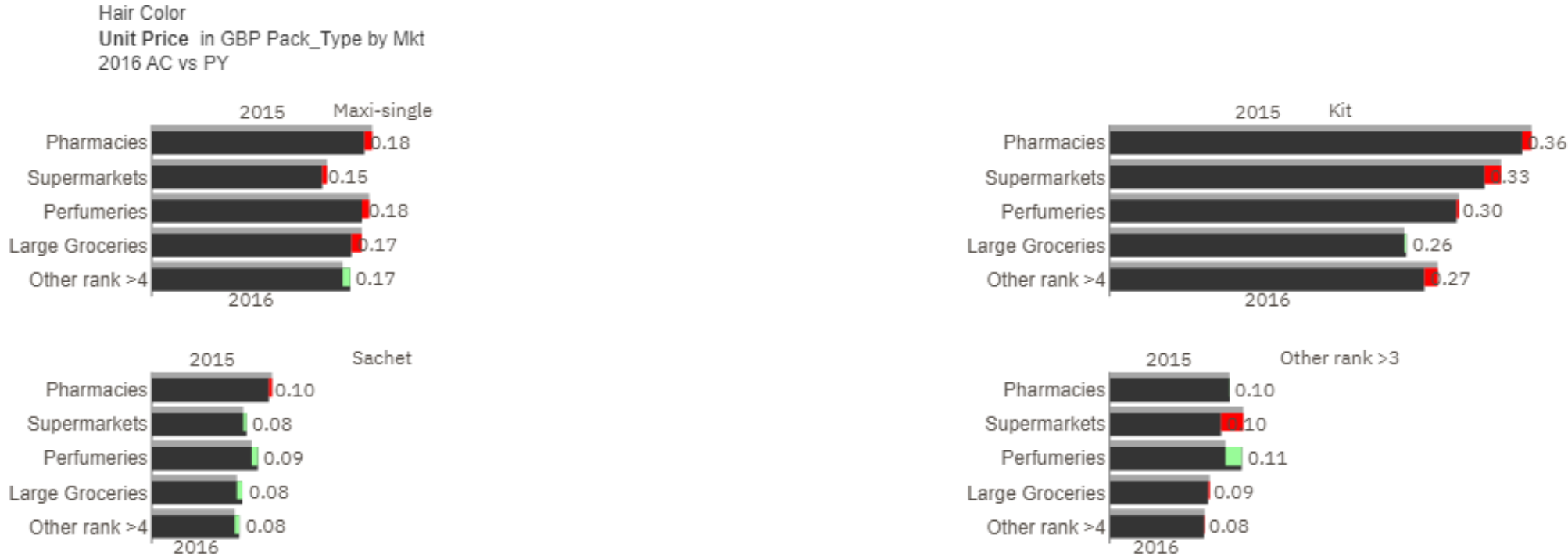
The hair color market grew modestly from 2015 to 2016, with a significant shift towards permanent hair color products, especially cream-based kits and powder sachets. However, Coty and pharmacy sales channels saw declines. Consumer preferences for product types, forms, and purchasing channels had a major impact on sales performance, indicating a dynamic market.



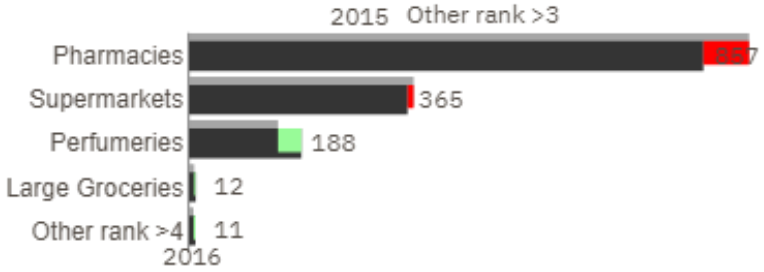
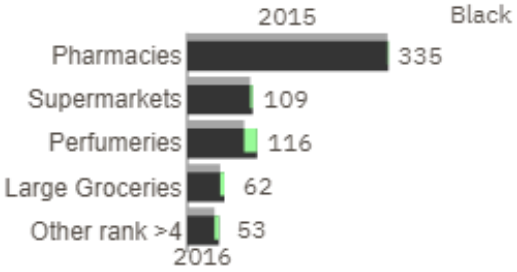
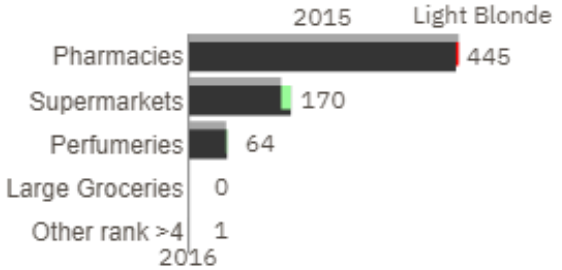
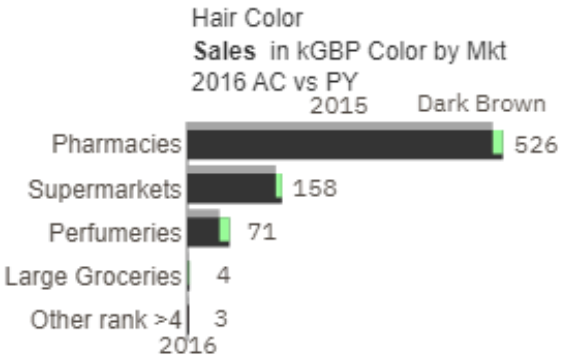
From 2015 to 2016, the hair color market grew in areas like Cream and Powder forms, Sachet packs, and Perfumeries. Black and Dark Brown remained consistently popular with consumers. However, Mousse and Coty faced notable declines. Consumer preferences and market trends were dynamic, with growth in some areas contrasting challenges in others.



From 2015 to 2016, hair color sachet packs saw unit price growth, especially in large groceries and perfumeries. However, supermarkets had declining unit prices for kit and other rank >3 pack types. Maxi-single and kit pack types performed variably but stably across markets. The trends point to market sensitivity to pack types, suggesting opportunities for strategic pricing and targeted marketing to boost revenue.



From 2015 to 2016, the hair color market saw a trend towards darker shades like Dark Brown and Black, which grew substantially in key segments. Perfumeries had strong growth across all colors, highlighting their importance. Pharmacies had mixed results - growth in Dark Brown and Black but declines in Light Blonde and other colors ranked below the top 3. Large Groceries and markets ranked below the top 4 showed potential for growth, despite lower sales than Supermarkets and Pharmacies. Consumer purchasing behaviors and preferences varied across segments.



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The hair color market is dominated by pharmacies, accounting for over 60% of total sales for most subbrands in 2016, with 'Not Applicable' and 'Maxi Single' being the top-selling subbrands (p.18). Consumers strongly prefer 'Level 3 - Permanent' hair color across all markets, with pharmacies leading in sales, especially for permanent solutions (p.20). Permanent hair color solutions across various shades are the most popular, with the 'Other rank >3' category also showing significant sales, highlighting diverse consumer interest (p.21).

In 2016, the hair color product market saw mixed results, with Powder and Cream forms growing, while Mousse and the 'Other rank >4' category declined (p.22). The Cream form has the highest total sales at 2.9 million GBP, mainly from Pharmacies and Supermarkets, while the Powder form has a niche market presence (p.19). Hoyu Co Ltd Japan and All Other Companies show strong growth across most product lines, while Coty and Henkel struggle with declining sales for many of their pack types (p.23).

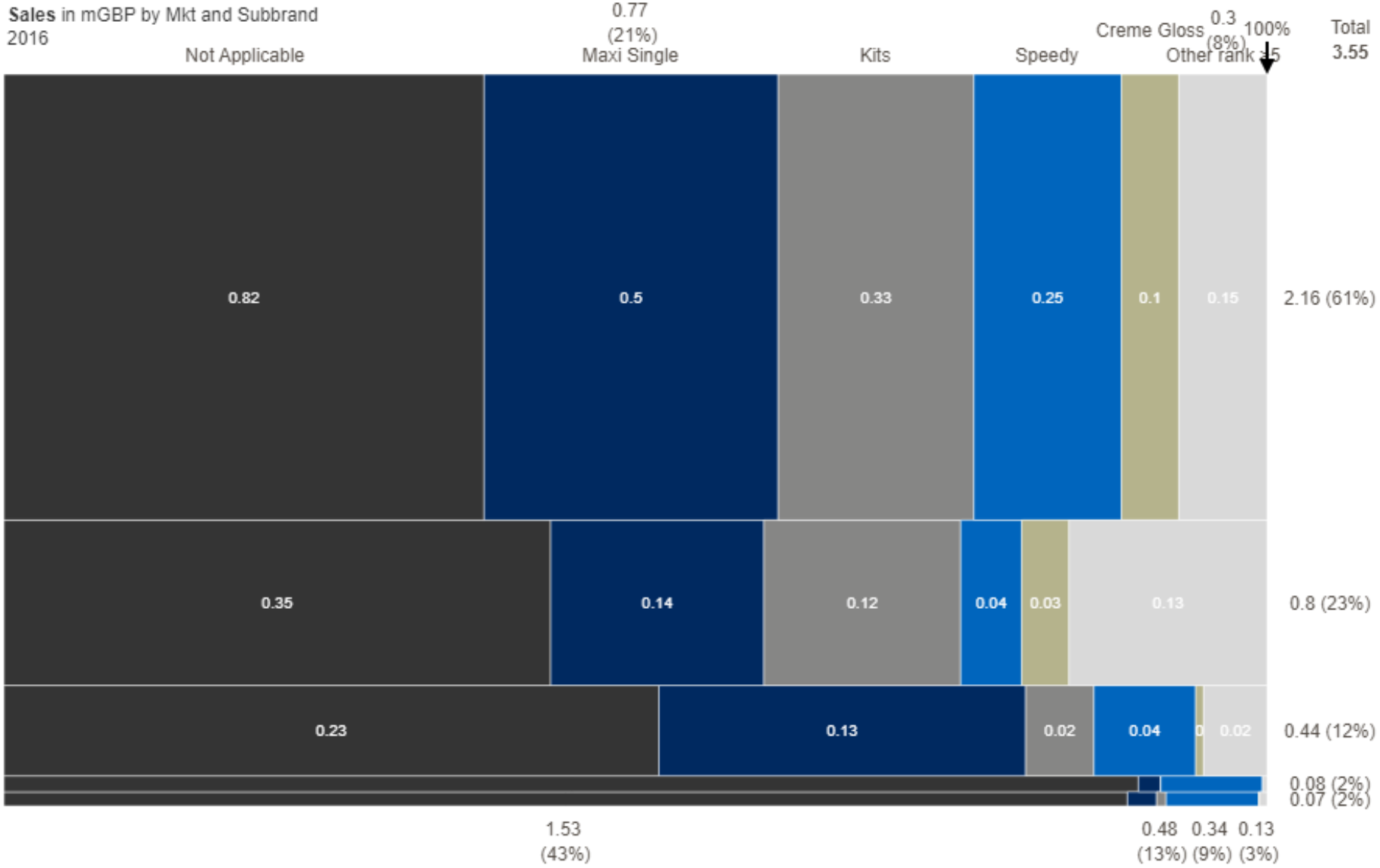
The Maxi-single Pack_Type, especially in Cream form, dominates hair color sales with over 10.0 million units (p.24), and has the highest sales across all color categories (p.25). Sachets are exclusively used for Powder form, with sales exceeding 3.3 million units (p.24). The 'Level 3 - Permanent' hair color category had the lowest unit price but the highest sales, indicating that lower prices generally lead to higher volumes and drive overall revenue (p.26).

The dataset shows a strong market preference for permanent hair color solutions, especially in Cream form, indicating a broad consumer base for long-lasting hair color products (p.27). Cream form hair care products dominate the market in both volume and sales, despite having a lower Unit Price, suggesting a strong consumer preference for Cream products (p.28). There seems to be a trade-off between Unit Price and Units sold across different forms, with lower-priced products (Cream and Powder) selling more units than higher-priced ones (Gel, Mousse, and Liquid), indicating price sensitivity in the hair care market (p.28).

Cream form permanent hair color is the clear favorite, with sales of 2.8 million GBP, significantly outperforming all other product forms and durations, thanks to its high volume of units sold despite a relatively low unit price (p.29).

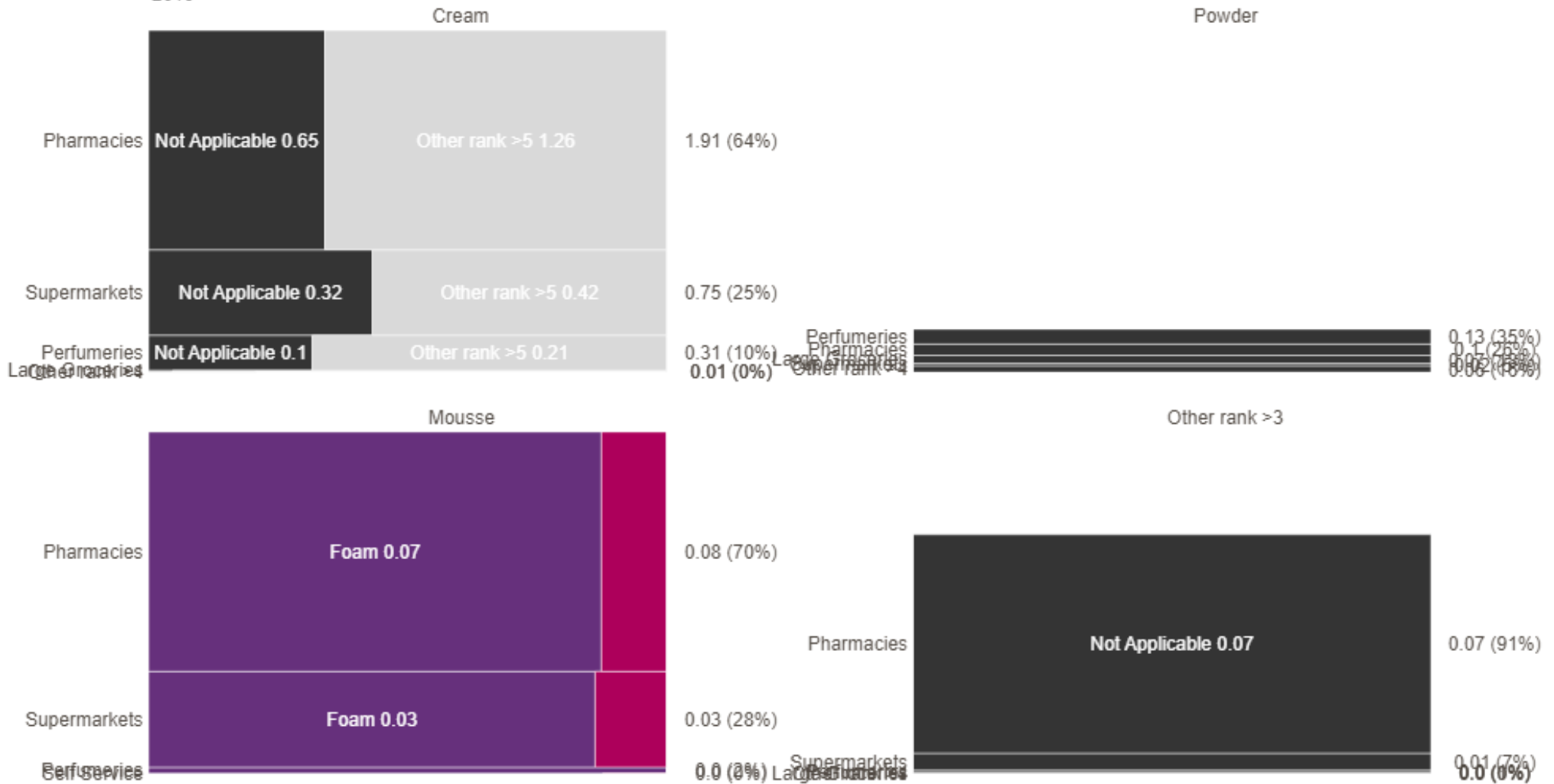
Pharmacies dominate the hair color market, making up over 60% of total sales for most subbrands in 2016. 'Not Applicable' and 'Maxi Single' are the top-selling subbrands, indicating they're the most popular with consumers.

Hair Color
Sales in mGBP by Mkt and Subbrand
2016



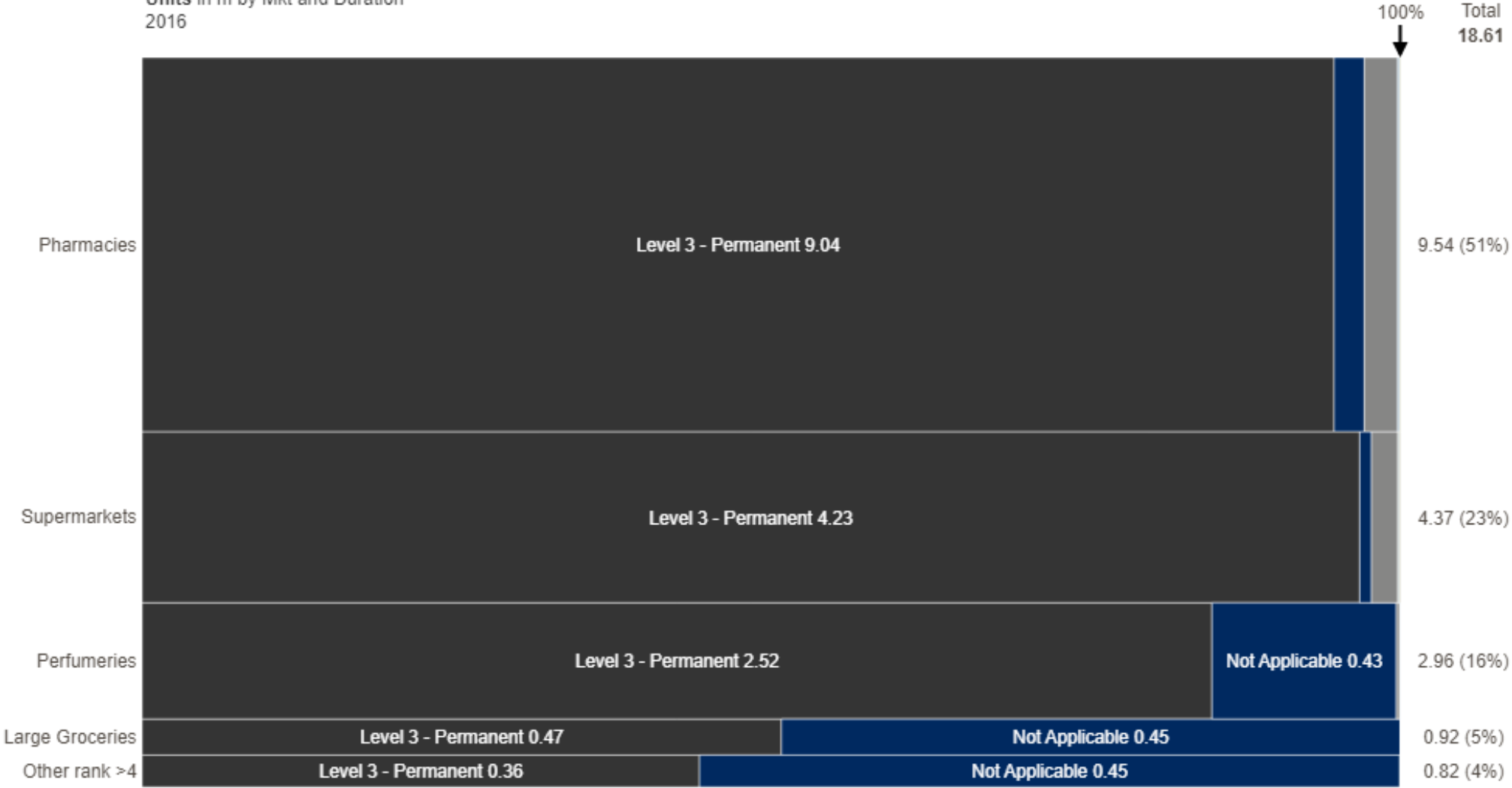
The Cream form has the highest total sales at 2.9 million GBP. The majority of these sales come from Pharmacies and Supermarkets. The Powder form shows limited presence with significantly lower sales, suggesting a niche market.

Hair Color
Sales in mGBP by Form, Mkt and Subbrand
2016



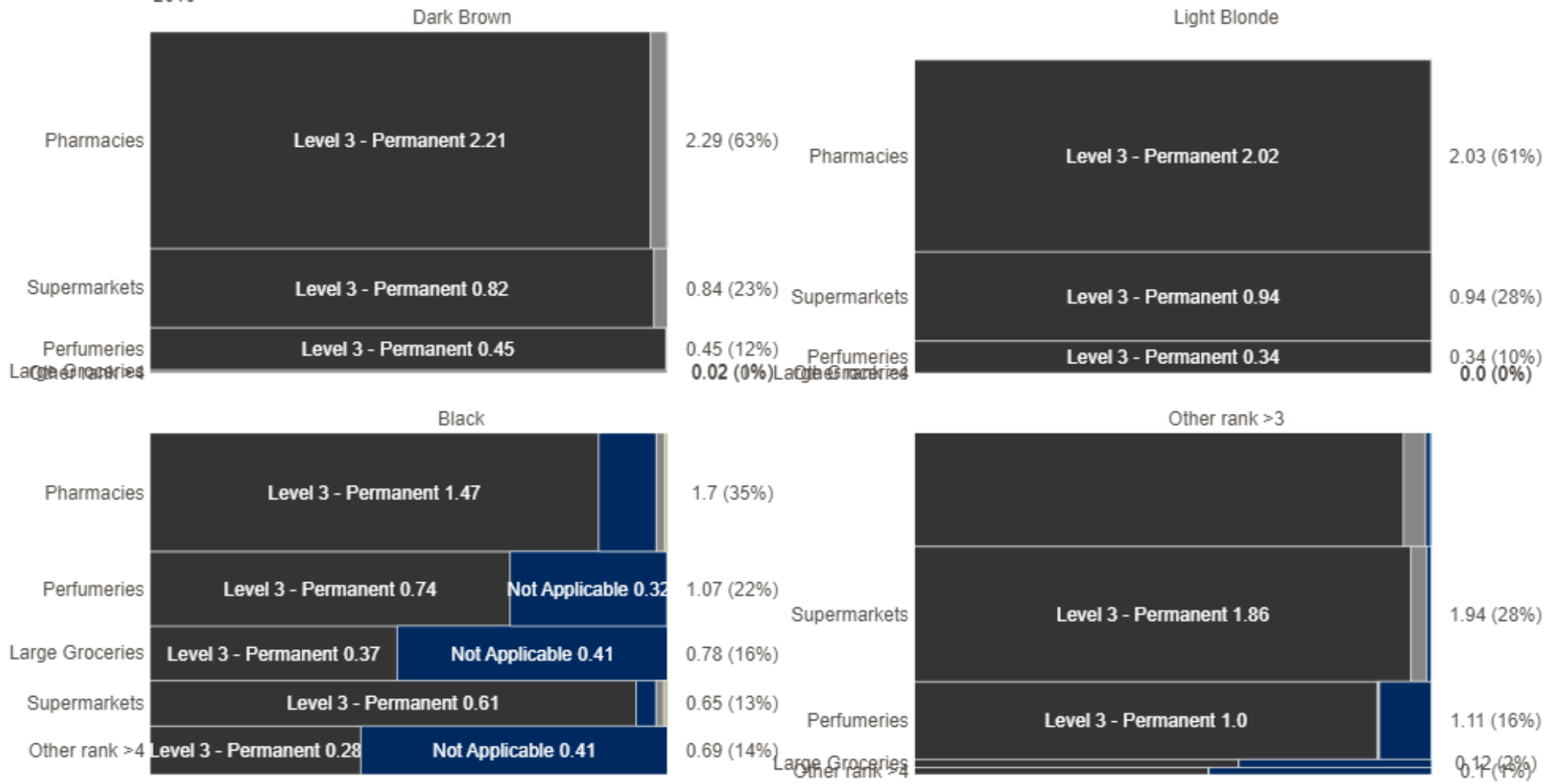
Consumers across all markets strongly prefer 'Level 3 - Permanent' hair color. Pharmacies lead in hair color product sales, especially for permanent solutions, suggesting people prefer buying long-lasting hair color there over other places.

Hair Color
 Units in m by Mkt and Duration
 2016



Permanent hair color solutions across various shades are strongly preferred by the market, with pharmacies being the top distribution channel. The 'Other rank >3' category also has significant sales, highlighting diverse consumer interest beyond traditional color options.

Hair Color
Units in m by Color, Mkt and Duration
2016

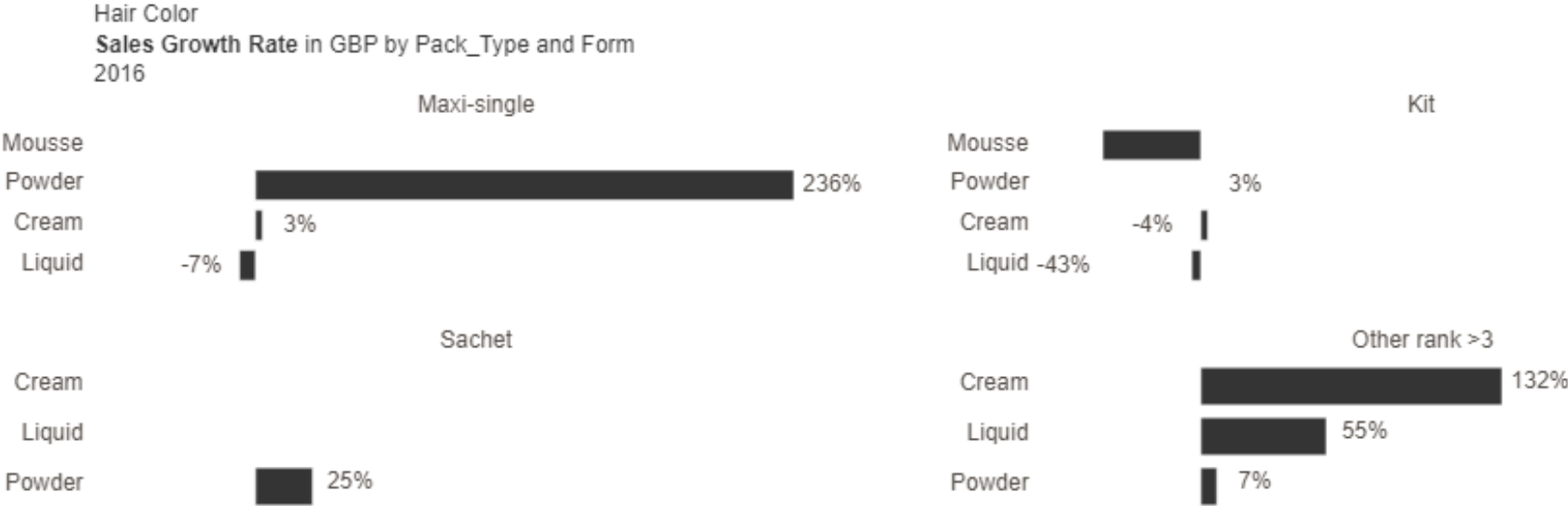


In 2016, the hair color product market saw mixed results across different forms. Powder and Cream grew, while Mousse and the 'Other rank >4' category declined significantly. Notably, Powder form products grew by 20%, suggesting strong consumer preference for this form in 2016.

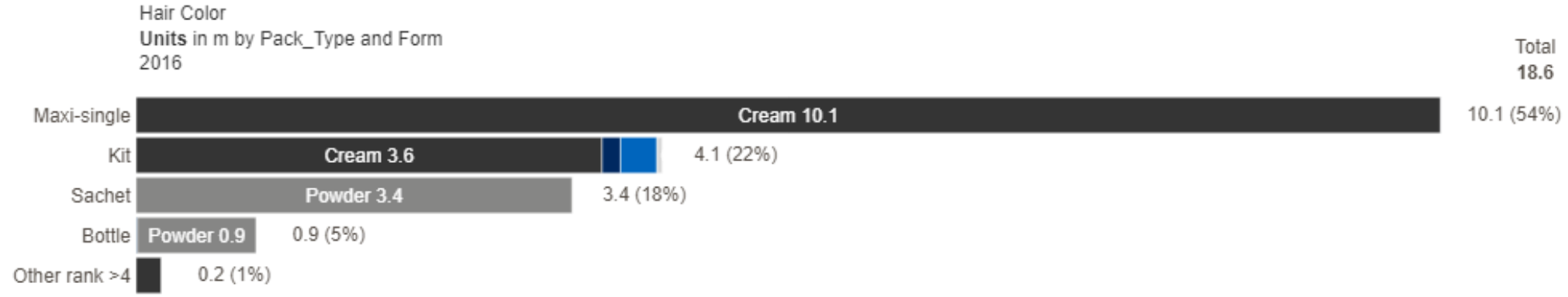
Hair Color
Sales Growth Rate in GBP by Form
2016



Hoyu Co Ltd Japan and All Other Companies show strong growth across most product lines, while Coty and Henkel struggle with declining sales for many of their pack types. The dramatic growth rates for some companies and pack types contrast sharply with declines for others, highlighting the importance of innovation and market adaptation in the hair color industry.

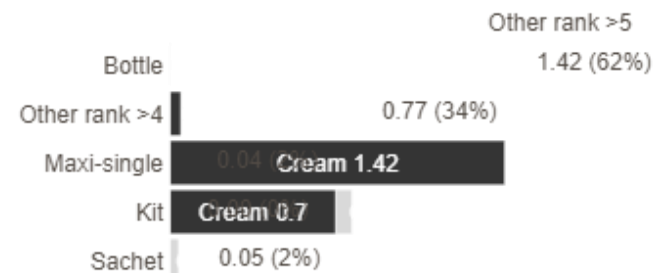
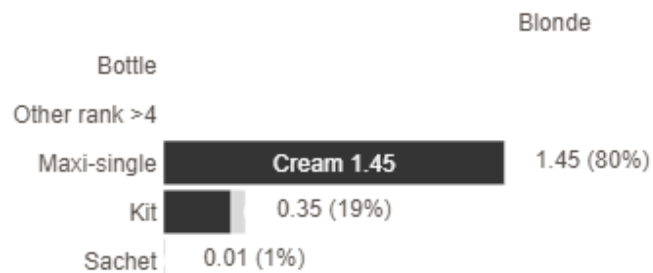
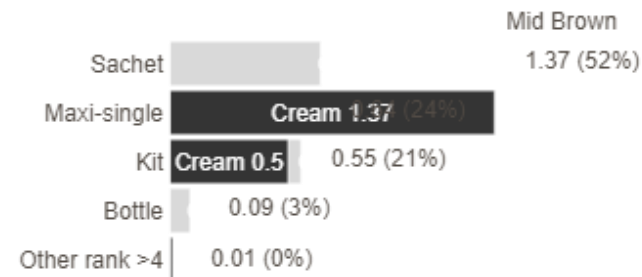
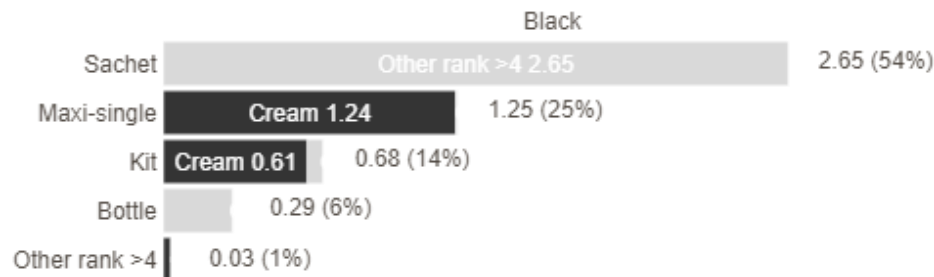
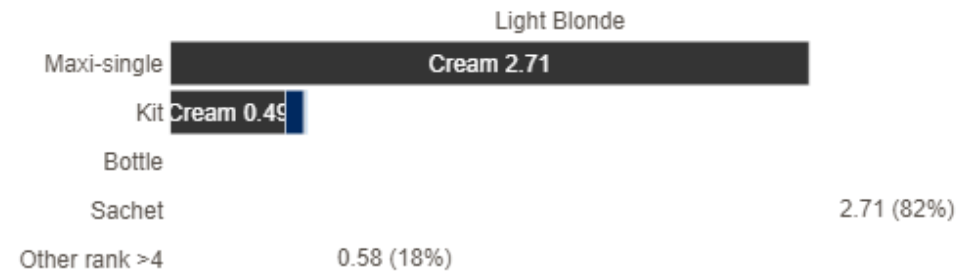
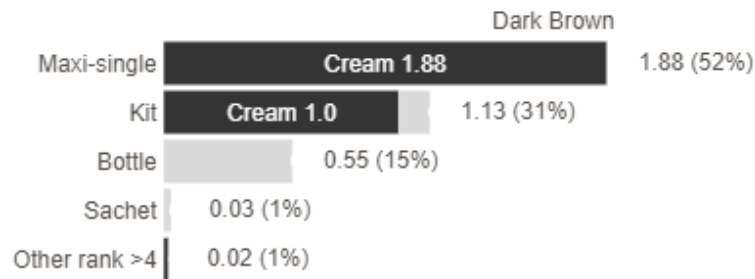


The Maxi-single Pack_Type, especially in Cream form, dominates hair color sales with over 10.0 million units, making it the most popular choice in 2016. Sachets are exclusively used for Powder form, with sales exceeding 3.3 million units, indicating a significant preference or practicality in packaging powder hair color this way.



The 'Maxi-single' pack type has the highest sales across all color categories in the 'Cream' form. 'Light Blonde' and 'Black' colors show significant sales in both 'Maxi-single' and 'Kit' pack types.

Hair Color
Units in m by Color, Pack_Type and Form
2016

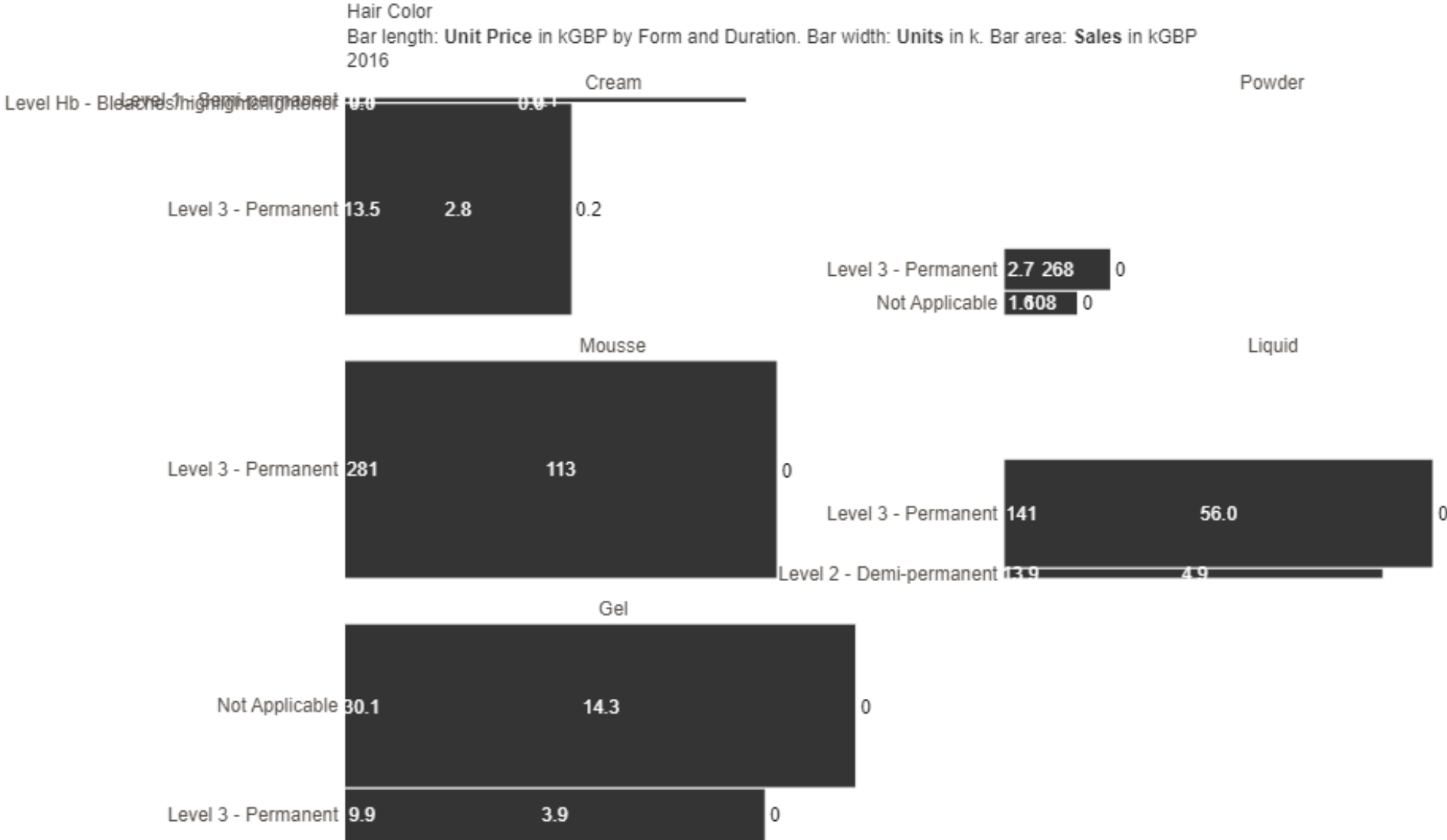


The 'Level 3 - Permanent' hair color category had the lowest unit price but the highest sales. Lower prices generally lead to higher volumes, driving overall revenue.

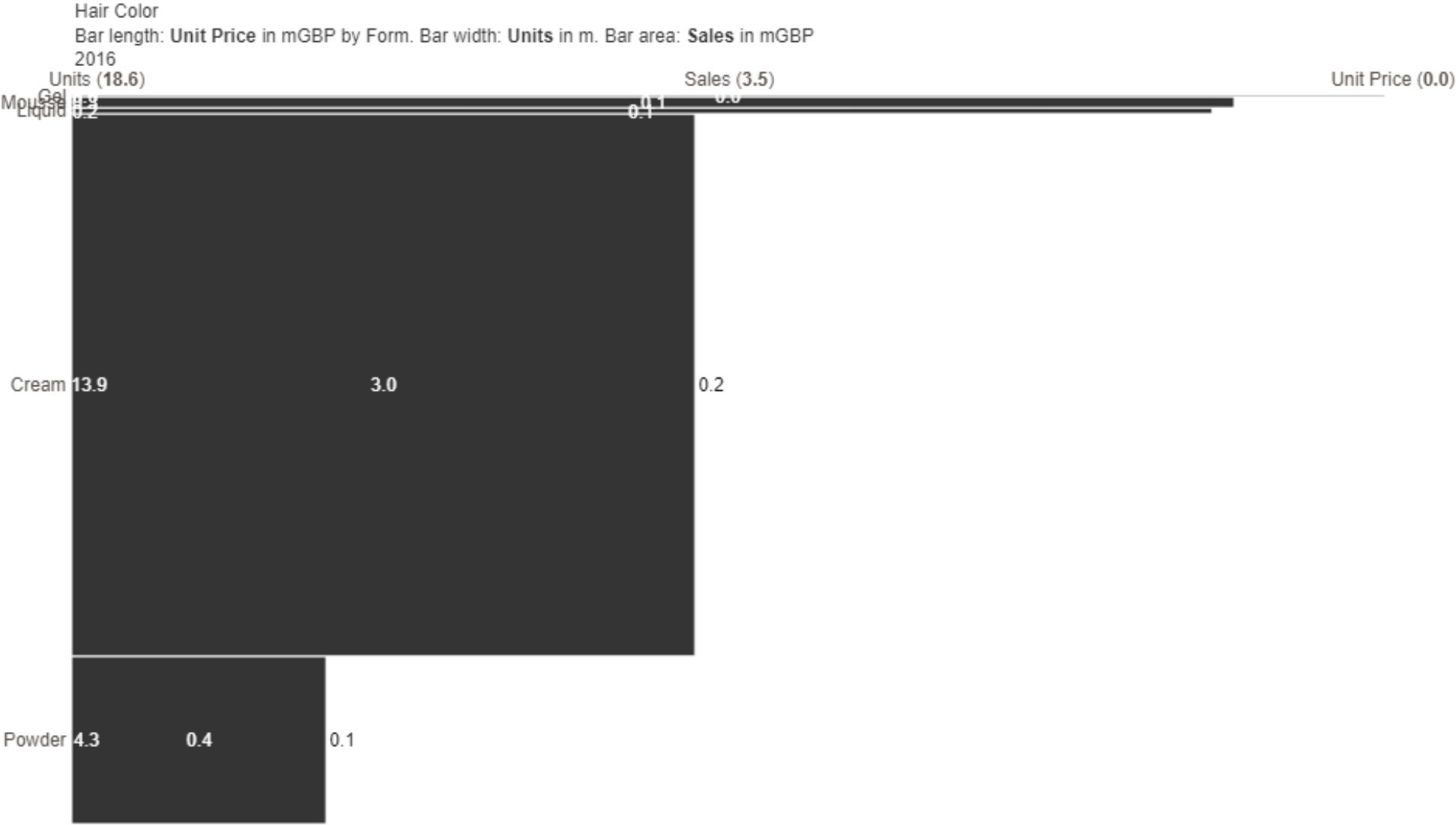
Hair Color
 Bar length: Unit Price in mGBP by Duration. Bar width: Units in m. Bar area: Sales in mGBP
 2016



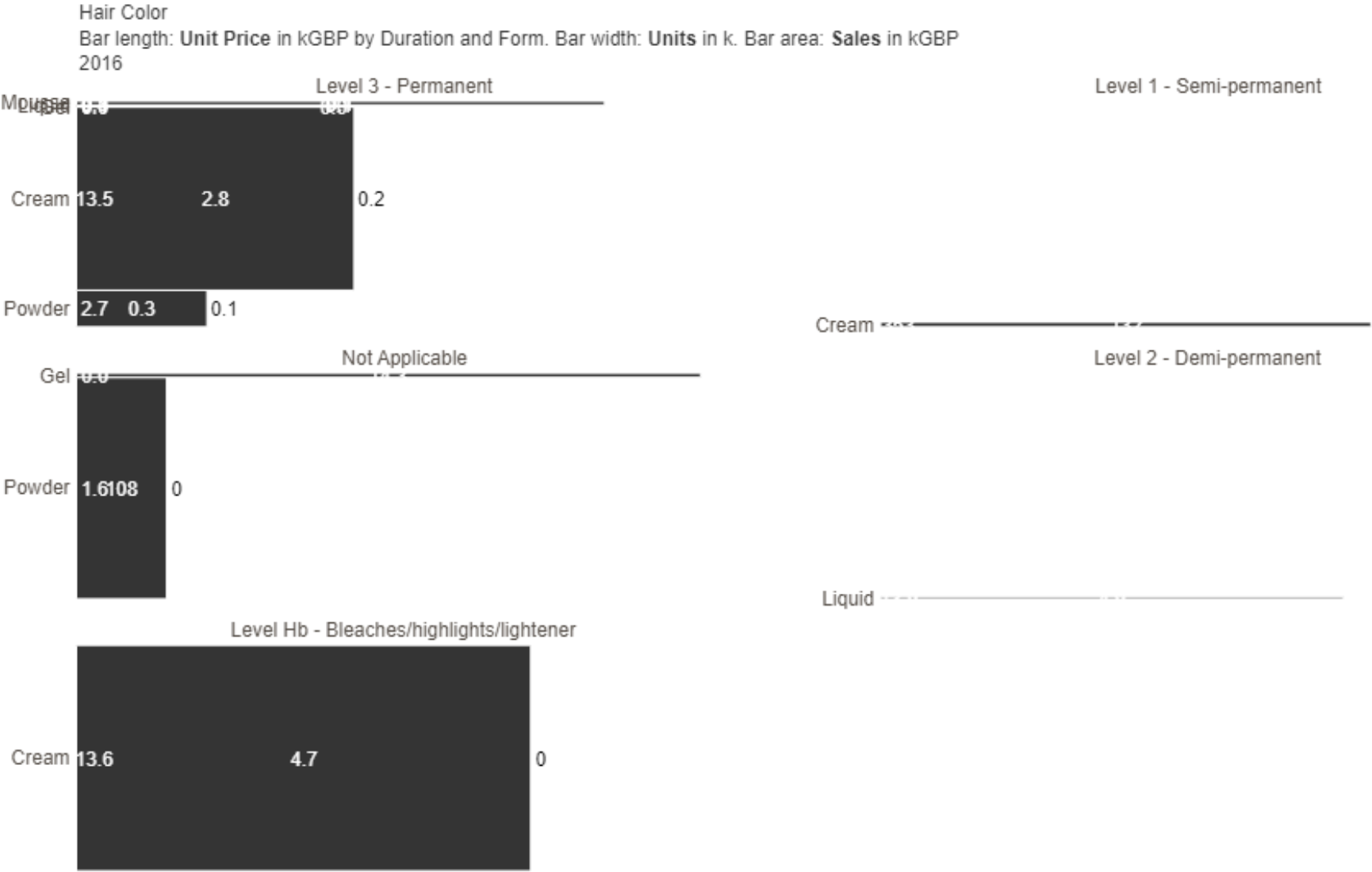
The dataset shows a strong market preference for permanent hair color solutions, especially in Cream form. This indicates a broad consumer base for long-lasting hair color products. The 'Level 3 - Permanent' category has the highest sales across multiple forms like Cream, Powder, Mousse, Liquid, and Gel. The Cream form in this category shows exceptionally high sales and a significant volume of units sold.



Cream form hair care products dominate the market in both volume and sales, despite having a lower Unit Price. This suggests a strong consumer preference for Cream products. There seems to be a trade-off between Unit Price and Units sold across different forms, with lower-priced products (Cream and Powder) selling more units than higher-priced ones (Gel, Mousse, and Liquid), indicating price sensitivity in the hair care market.



Cream form permanent hair color is the clear favorite, with sales of 2.8 million GBP. It significantly outperforms all other product forms and durations, thanks to its high volume of units sold despite a relatively low unit price.



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In 2016, the hair color market was dominated by Dark Brown and Light Blonde categories, with Black hair color offering a budget-friendly option (p.32). Cream form was the most popular across all colors, while Powder provided a cost-effective choice (p.33, p.34). Permanent hair color in Cream form led the market, with Mousse, Liquid, and Gel targeting niche segments at higher prices (p.35).

Lakme stood out with a high unit price and growth rate, indicating successful premium positioning, while Unilever brands also performed well compared to competitors (p.36). Coty and L'Oréal accounted for about 70% of the market, with L'Oréal maintaining a strong brand value despite slightly higher prices (p.37). The top 25% of companies contributed 80% of sales, demonstrating efficient revenue generation and strong market positioning (p.38).

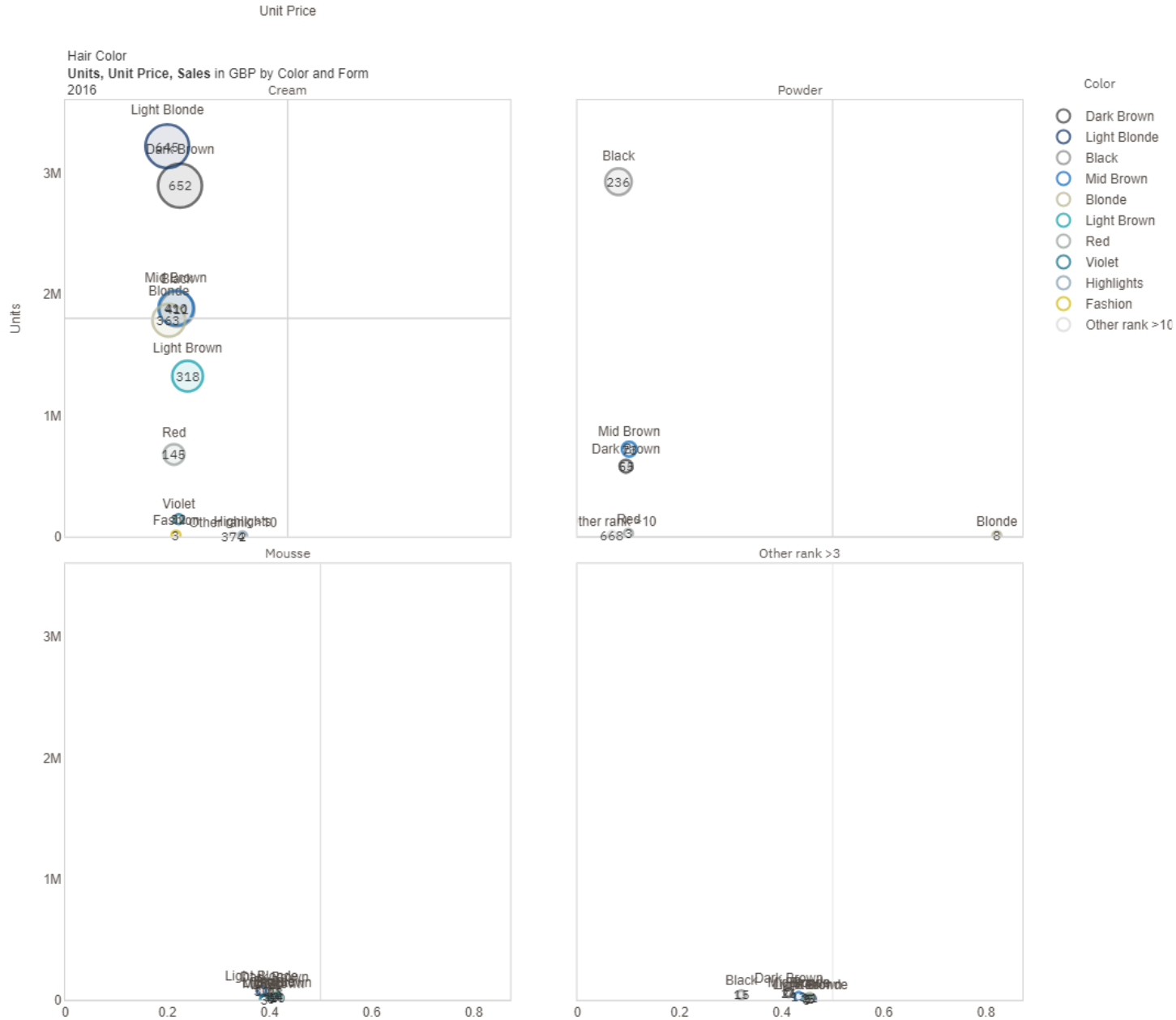
The hair color industry was highly concentrated, with just 16 markets making up 80% of sales (p.39). The top 21% of Subbrands and brands accounted for around 80% of sales and units, following the Pareto principle (p.40, p.41). Cream form products were the most common offering across companies, while Mousse was the least prevalent (p.42).

The market showed a stratified structure, with value and premium options serving different consumer segments (p.34). Companies offered a minimum of 3 product forms, suggesting potential gaps in the market for certain form combinations (p.42). Diversifying sales across more markets could help reduce the risk of overreliance on a few key ones (p.39).

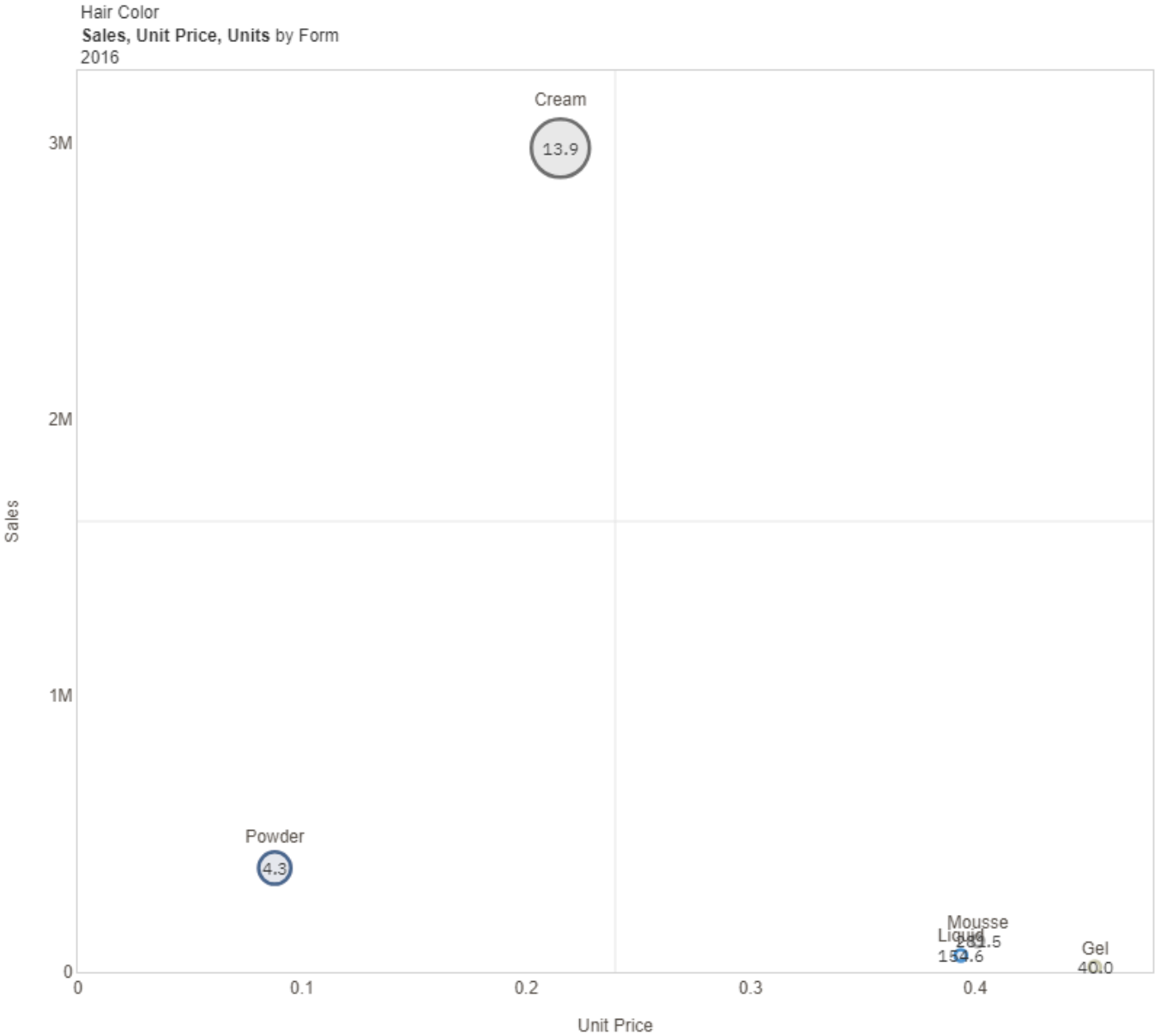
In 2016, Dark Brown and Light Blonde were the top-selling hair color categories. Black hair color was in high demand at a budget-friendly price, hinting at price-conscious consumers. Highlights had a niche market despite low sales volume, with premium pricing.



The Cream form dominated sales and units sold for most hair colors, showing strong market preference. Powder form was a cost-effective choice, especially for Black hair color. Mousse, Liquid, and Gel forms targeted niche markets at higher prices, likely aimed at consumers wanting specific product features or benefits.



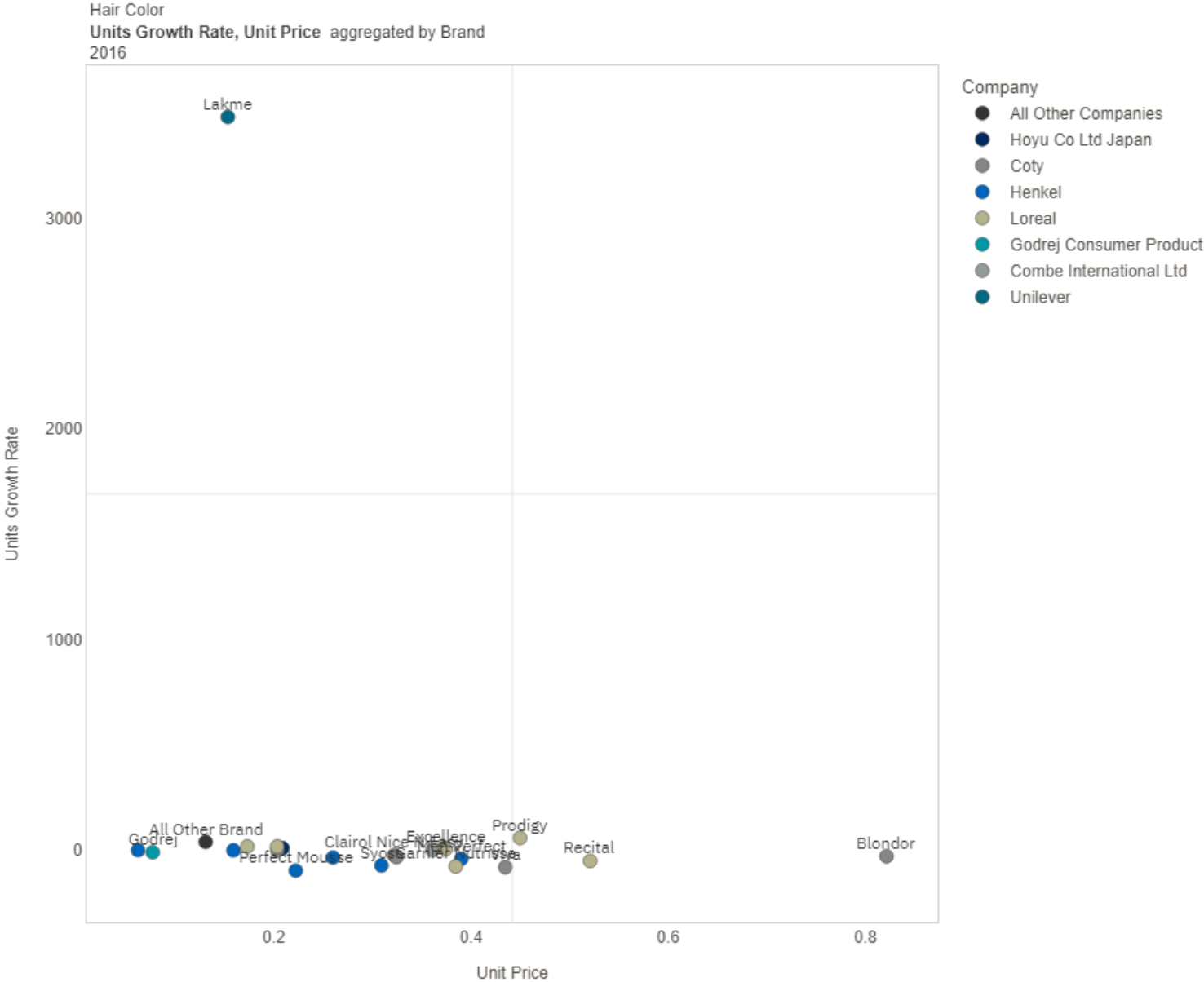
Cream was the most popular form, generating the highest sales and units sold. Powder offered a cost-effective option for price-sensitive buyers. Mousse, Liquid, and Gel targeted niche markets at higher prices. The presence of value and premium options suggests a stratified market serving different consumer segments.



Permanent hair color in cream form dominated, especially in dark brown and light blonde. Powder was a cost-effective option, particularly for black hair. Mousse and liquid permanent colors were pricier niche preferences. Semi-permanent colors had moderate demand. Less common durations and forms indicated premium niche markets.

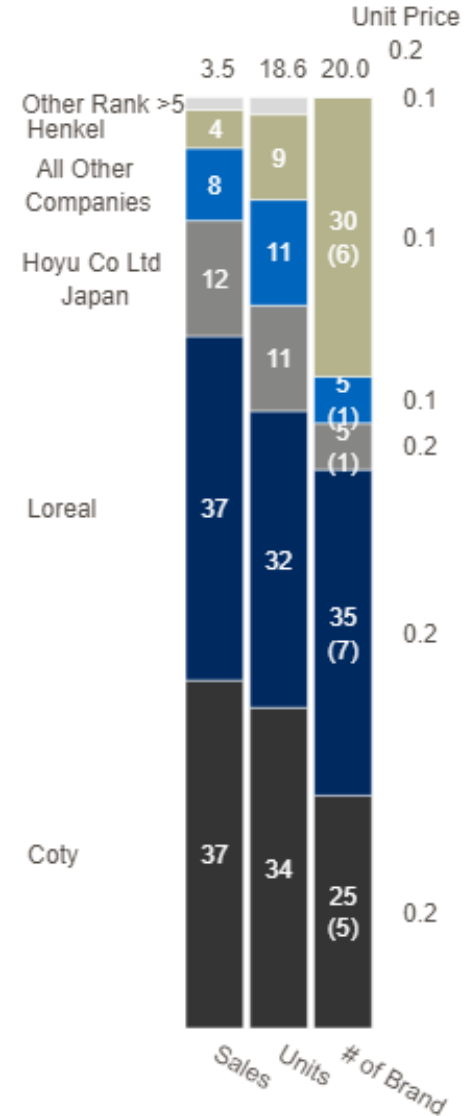


In 2016, most hair color brands had lower prices and growth rates. But Lakme stood out with a high unit price and growth rate, suggesting successful premium positioning. Unilever brands also had higher prices and growth compared to Combe International, Godrej Consumer Products, Hoyu Co, and Coty.

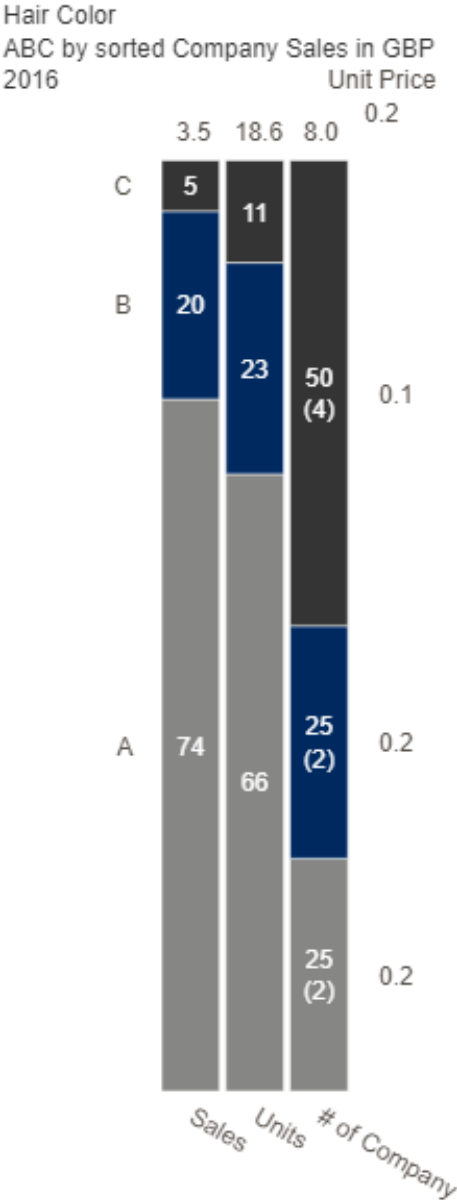


In 2016, Coty and L'Oréal dominated the hair color market, together accounting for about 70% of sales and units. L'Oréal had the most extensive brand portfolio, followed by Henkel. Despite slightly higher unit prices, L'Oréal maintained competitive sales figures, indicating strong brand value. The presence of smaller companies and brands highlighted a fragmented portion of the market.

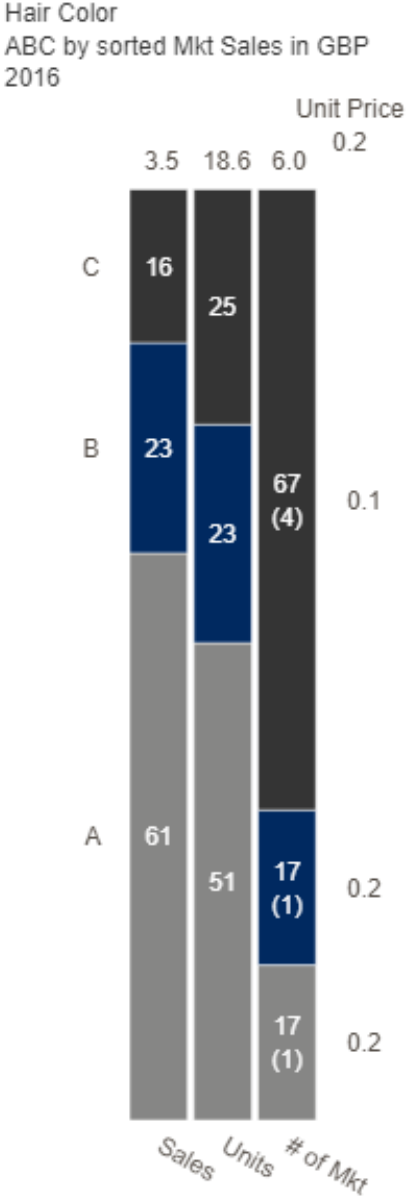
Hair Color
 ABC by sorted Company Sales in GBP, count by Bran
 2016



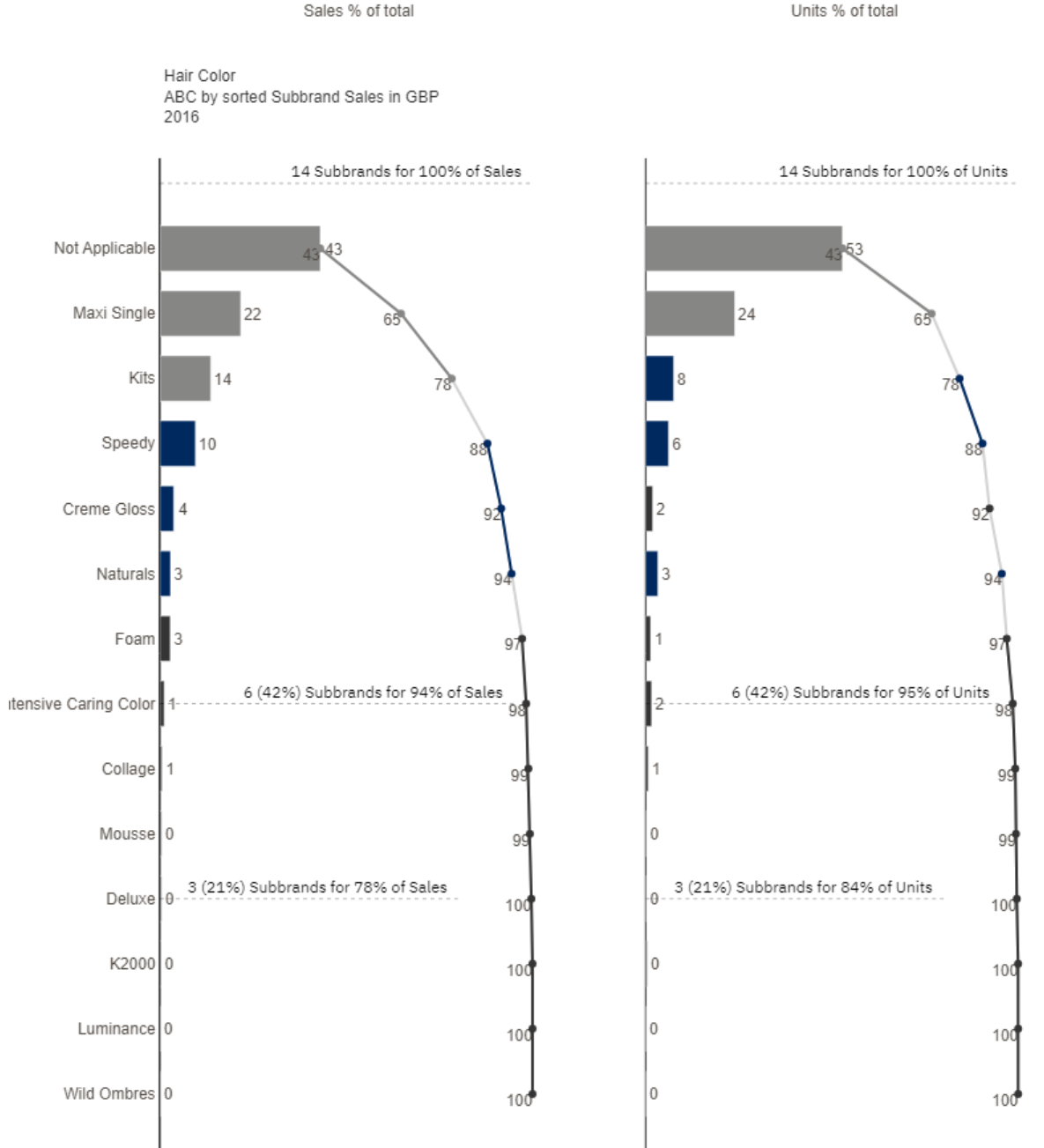
The hair color market showed a typical sales concentration. The top 25% of companies contributed 80% of sales. These companies were more efficient in converting units sold into revenue, commanding higher unit prices. Half of the companies contributed the least to sales, indicating challenges in pricing power and market share. The ability of top companies to sell more units at higher prices suggested strong market positioning.



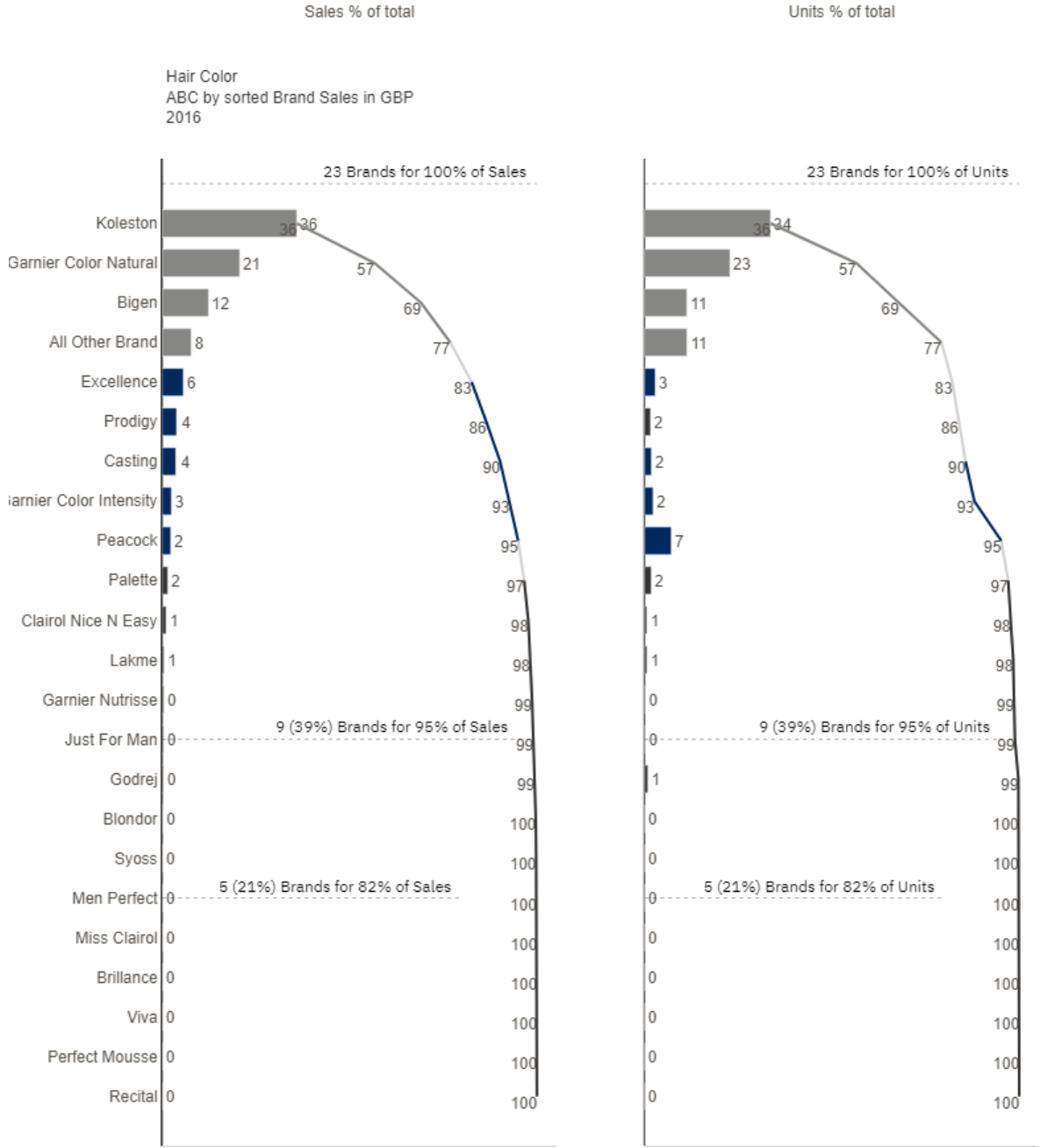
Just 16 markets made up 80% of hair color industry sales in 2016, showing intense concentration. Class A markets likely sold premium products, while Class C focused on lower-priced ones. The many Class C markets suggested potential for optimization or consolidation. Diversifying sales across more markets could reduce the risk of overreliance on a few key ones.



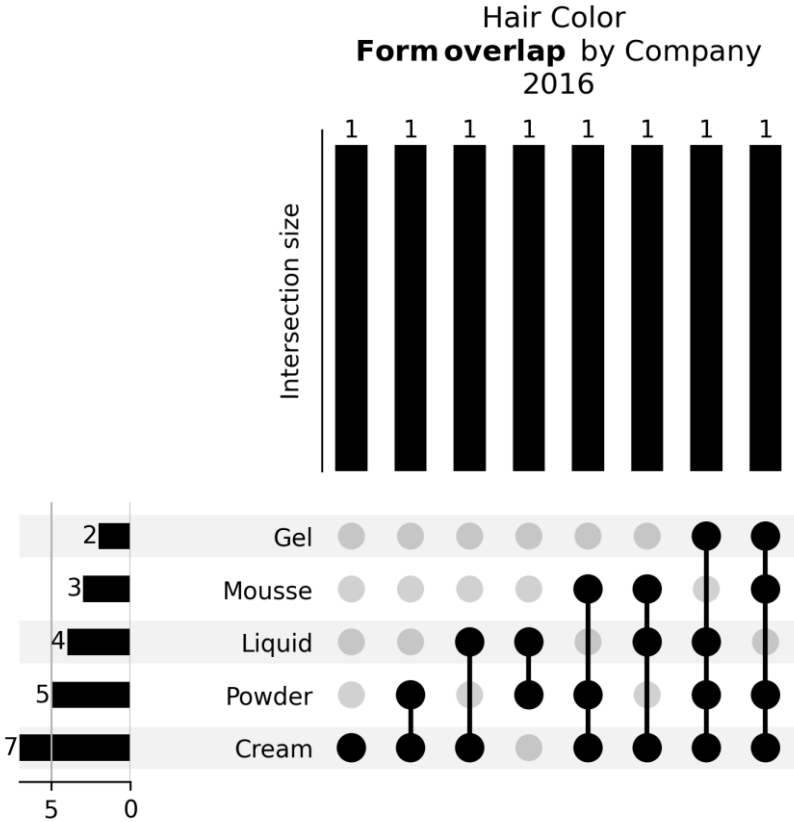
In 2016, the top 21% of hair color Subbrands (Class A) made up 78% of sales and 84% of units. The sales and units distribution across Subbrands was consistent within the same class, with no significant disparities. The smooth curves in both charts indicated no negative sales or units for any Subbrand.



In 2016, 21% of hair color brands contributed 82% of sales, following the Pareto principle. The concentration by units was identical, with no evident discrepancy between units sold and sales revenue across brands. There were no brands with negative units.



In 2016, cream form products were the most common offering across hair color companies, included in every intersection of product forms. Mousse products were the least common, with the smallest set size and inclusion in the fewest intersections. Companies offered a minimum of 3 product forms, with no single company offering all 5 forms. The absence of certain form combinations suggested potential gaps in the market.



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Sales grew modestly from \$3.5 million in 2015 to \$3.5 million in 2016, representing a 1.7% CAGR. However, units sold increased at a faster rate, suggesting a shift towards lower-priced products or a decrease in average selling price (p.45). The overall product market expanded, with units growing at 7.3% annually, but performance varied significantly across subbrands. The 'Not Applicable' and 'Kits' subbrands drove most of the growth, while the 'Foam' subbrand experienced a sharp decline (p.46).

Certain market segments, such as Perfumeries, Large Groceries, and Other rank >4 segments, showed substantial growth, with CAGRs ranging from 17.1% to 21.9%. These high-growth segments indicate a strong consumer shift or increased market penetration. However, the Pharmacies segment saw a decline in sales, potentially due to increased competition or changes in consumer behavior (p.47). Despite the challenges, subbrands collectively demonstrated robust growth, with sales increasing from \$218.1k in 2015 to \$253.5k in 2016, representing a strong CAGR of 16.2% (p.48).

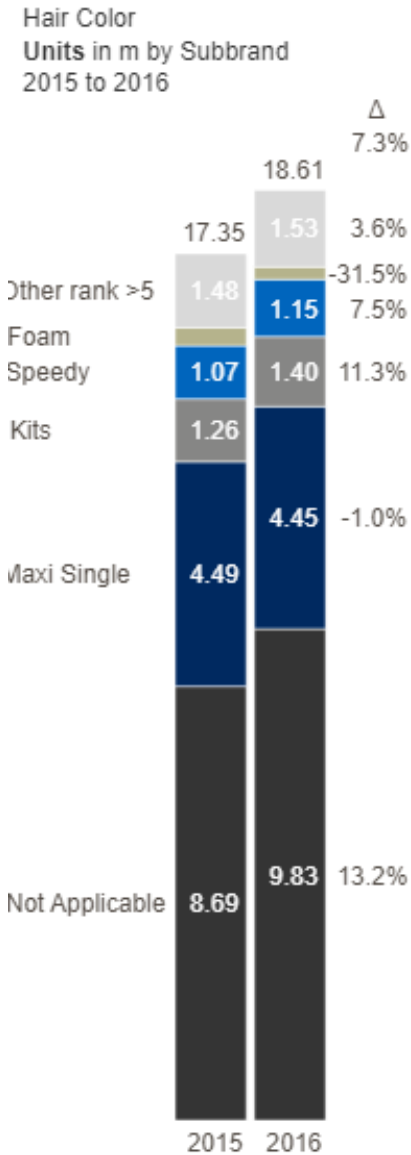
The overall market grew at a modest 1.7% CAGR, but individual company performance varied significantly. Smaller or emerging companies in the 'Other rank >5' category showed the most substantial growth at 50.3% CAGR. In contrast, Coty and Henkel experienced sales declines of -8.6% and -16.2% CAGR, respectively. L'Oréal and Hoyu Co Ltd Japan demonstrated steady growth, suggesting resilience and effective market strategies (p.49).

Sales grew from \$3.5 million in 2015 to \$3.5 million in 2016, a 1.7% CAGR. Units sold increased from 17.3 million to 18.6 million over the same period. The faster growth in units sold compared to sales suggests a lower average selling price or a shift to lower-priced products.

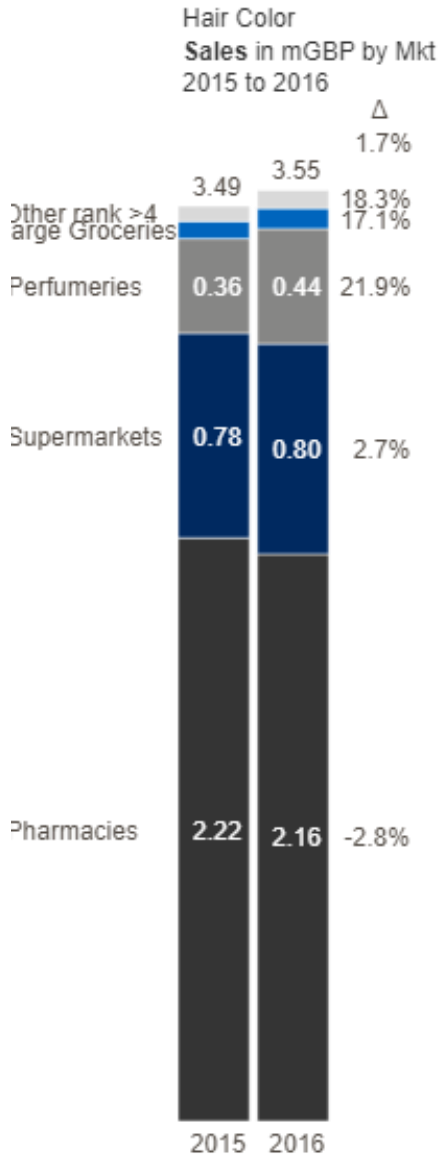
Hair Color
Bars: Sales in mGBP. Line: Units in m
2015 to 2016



Units per subbrand grew at 7.3% annually from 2015 to 2016. But performance differed significantly across subbrands. The 'Not Applicable' and 'Kits' subbrands drove most of the growth, increasing by 13.2% and 11.3% respectively. However, the 'Foam' subbrand saw a sharp 31.5% decline, suggesting falling consumer demand or supply issues.



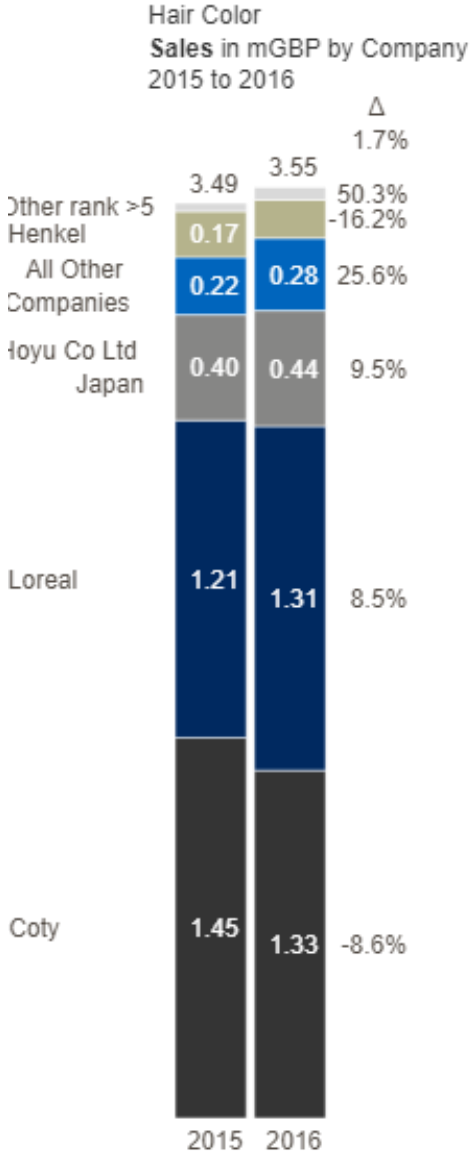
Perfumeries, Large Groceries, and Other rank >4 segments showed significant growth, with CAGRs of 21.9%, 17.1%, and 18.3% respectively. These high-growth segments suggest a strong consumer shift or increased market penetration. However, the Pharmacies segment sales declined, with a CAGR of -2.8%, potentially due to increased competition or changes in consumer behavior.



Subbrands collectively demonstrated robust growth, with sales increasing from \$218.1k in 2015 to \$253.5k in 2016, a strong CAGR of 16.2%.

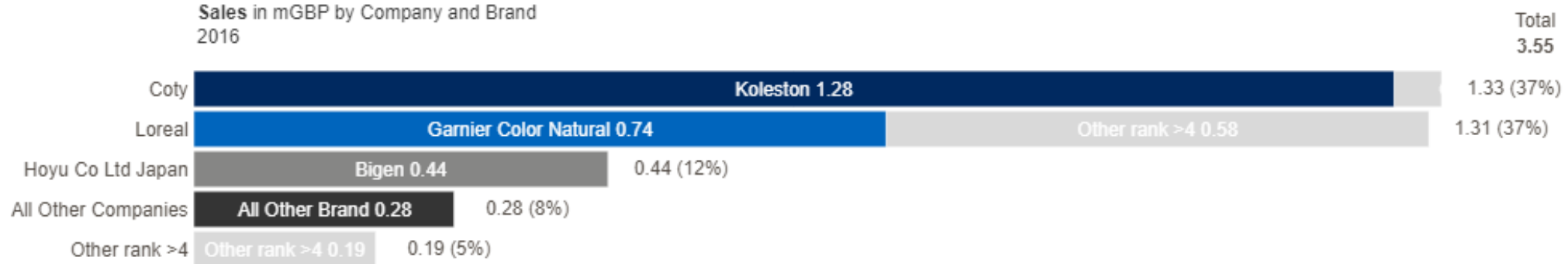


The overall market grew at a modest 1.7% CAGR. However, individual company performance varied greatly. Smaller or emerging companies in the 'Other rank >5' category showed the most significant growth at 50.3% CAGR. In contrast, Coty and Henkel experienced sales declines of -8.6% and -16.2% CAGR respectively. L'Oréal and Hoyo Co Ltd Japan demonstrated steady growth, suggesting resilience and effective market strategies.

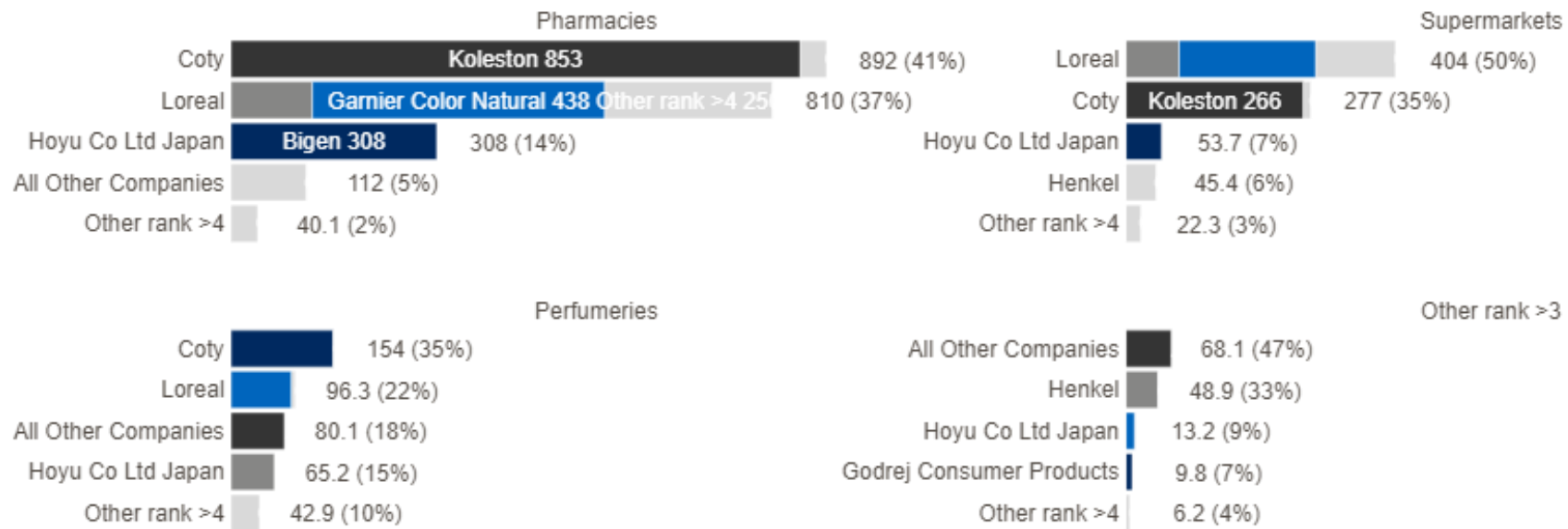


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Sales in mGBP by Company and Brand
 2016



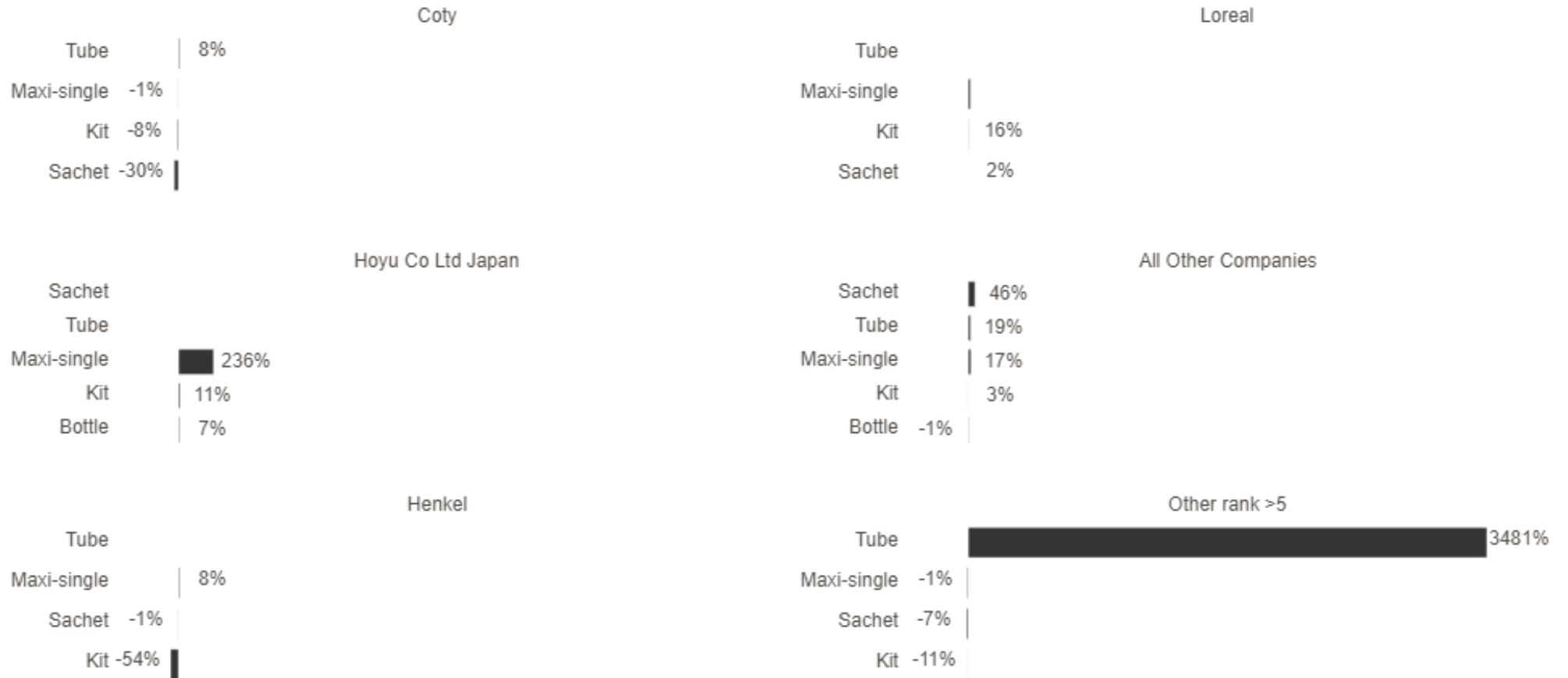
Hair Color
Sales in kGBP by Mkt, Company and Brand
2016



Hair Color
Units Growth Rate by Pack_Type
2016

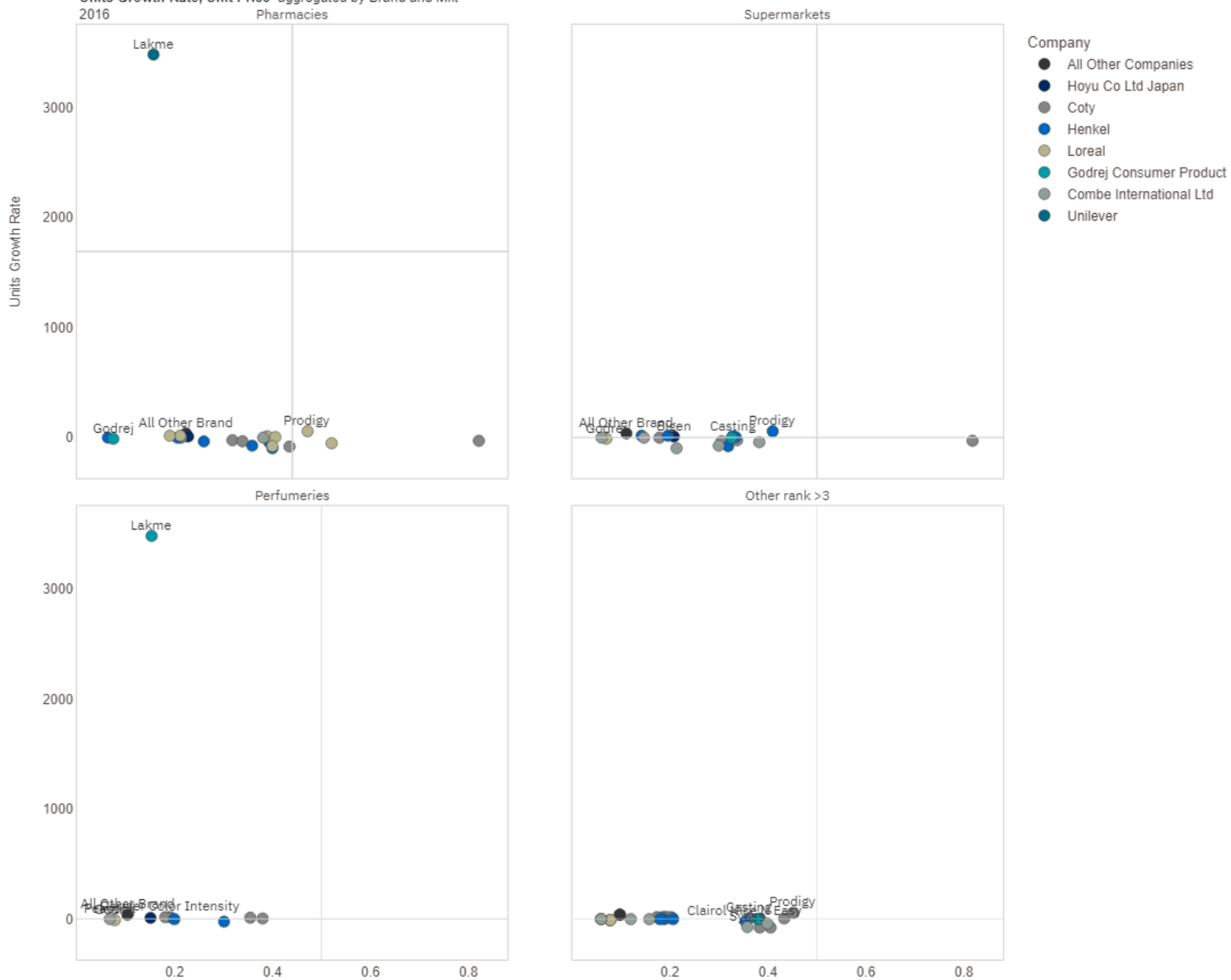


Hair Color
Units Growth Rate by Company and Pack_Type
2016

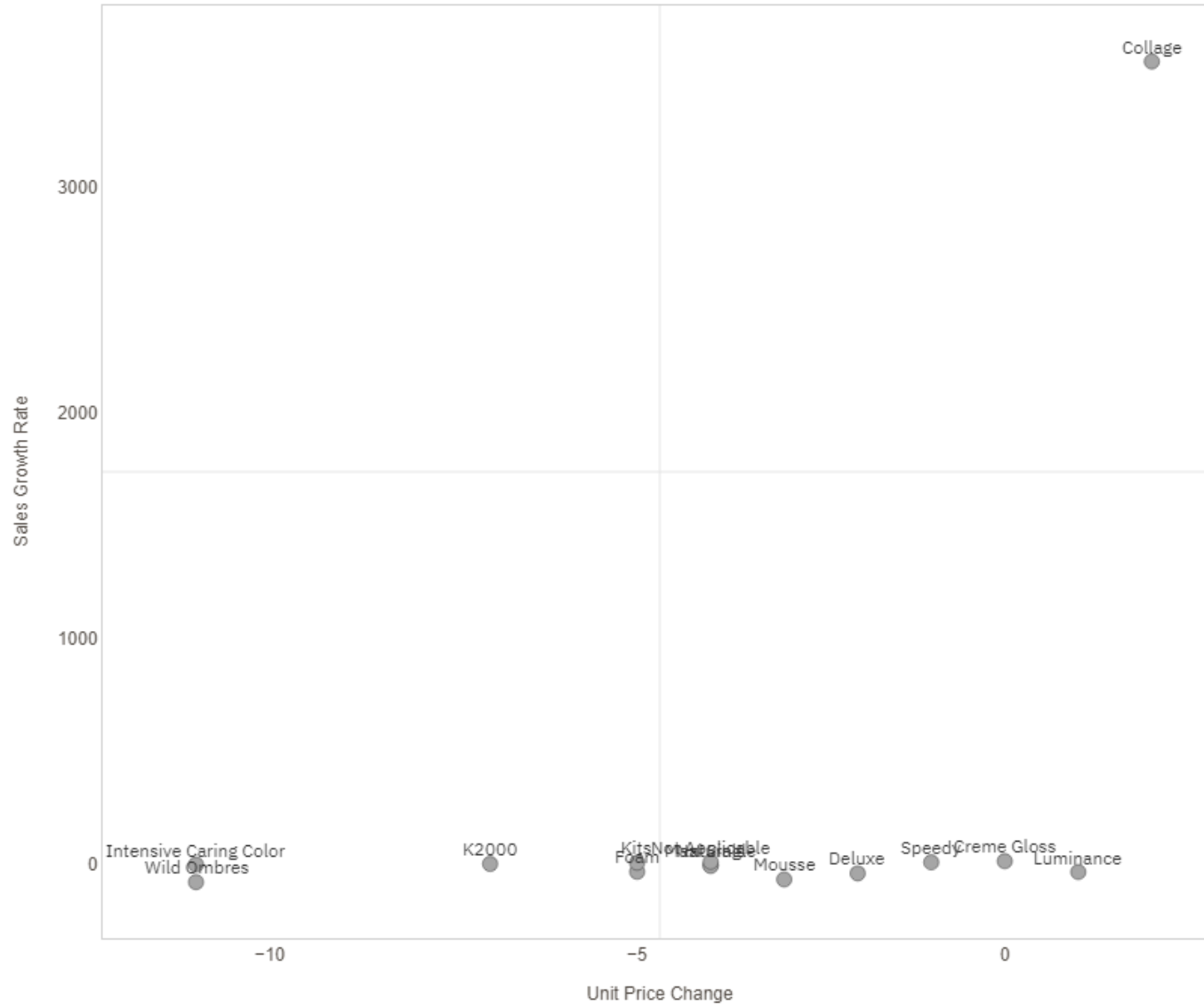


Unit Price

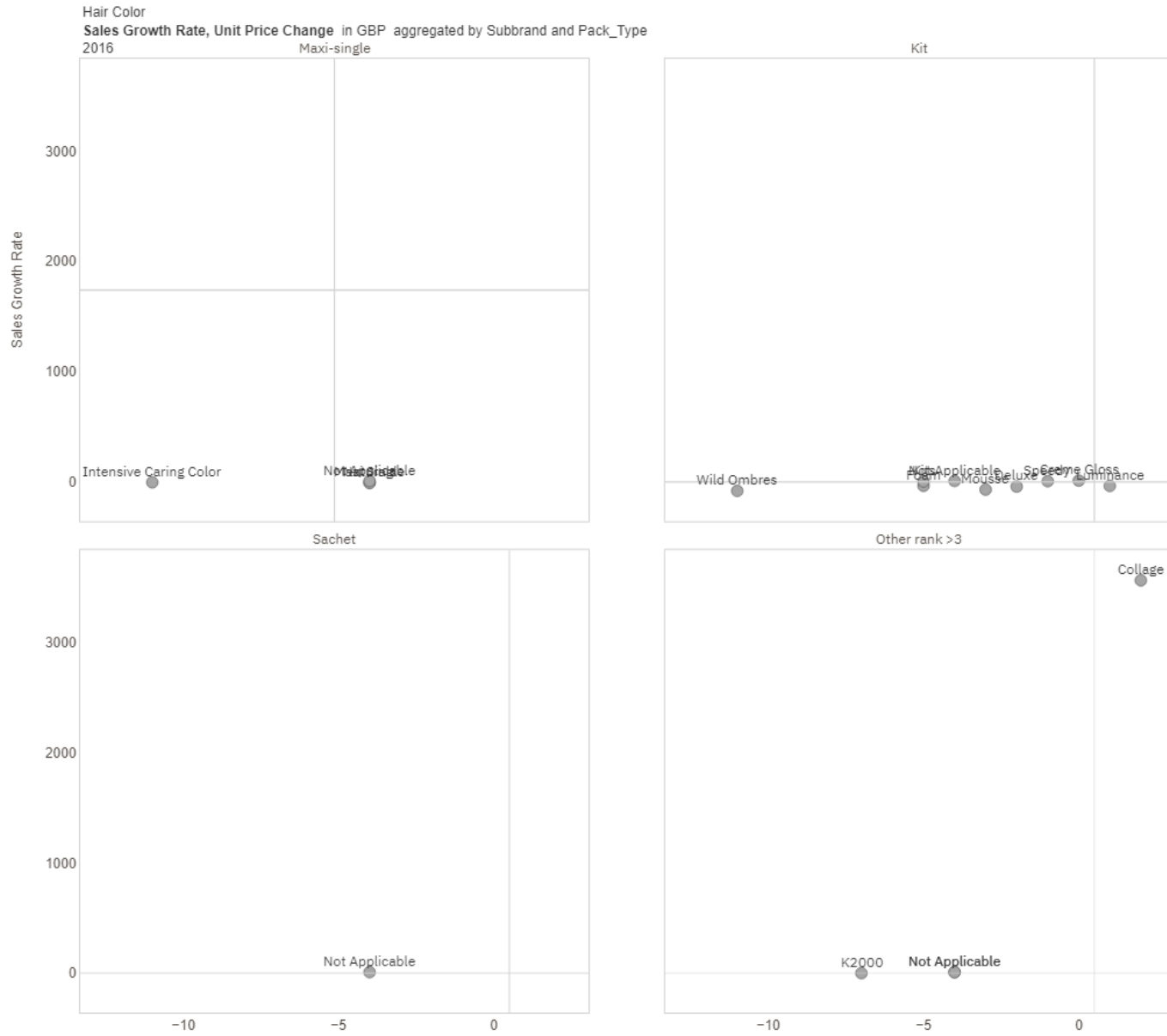
Hair Color
Units Growth Rate, Unit Price aggregated by Brand and Mkt
2016



Hair Color
Sales Growth Rate, Unit Price Change in GBP aggregated by Subbrand
2016

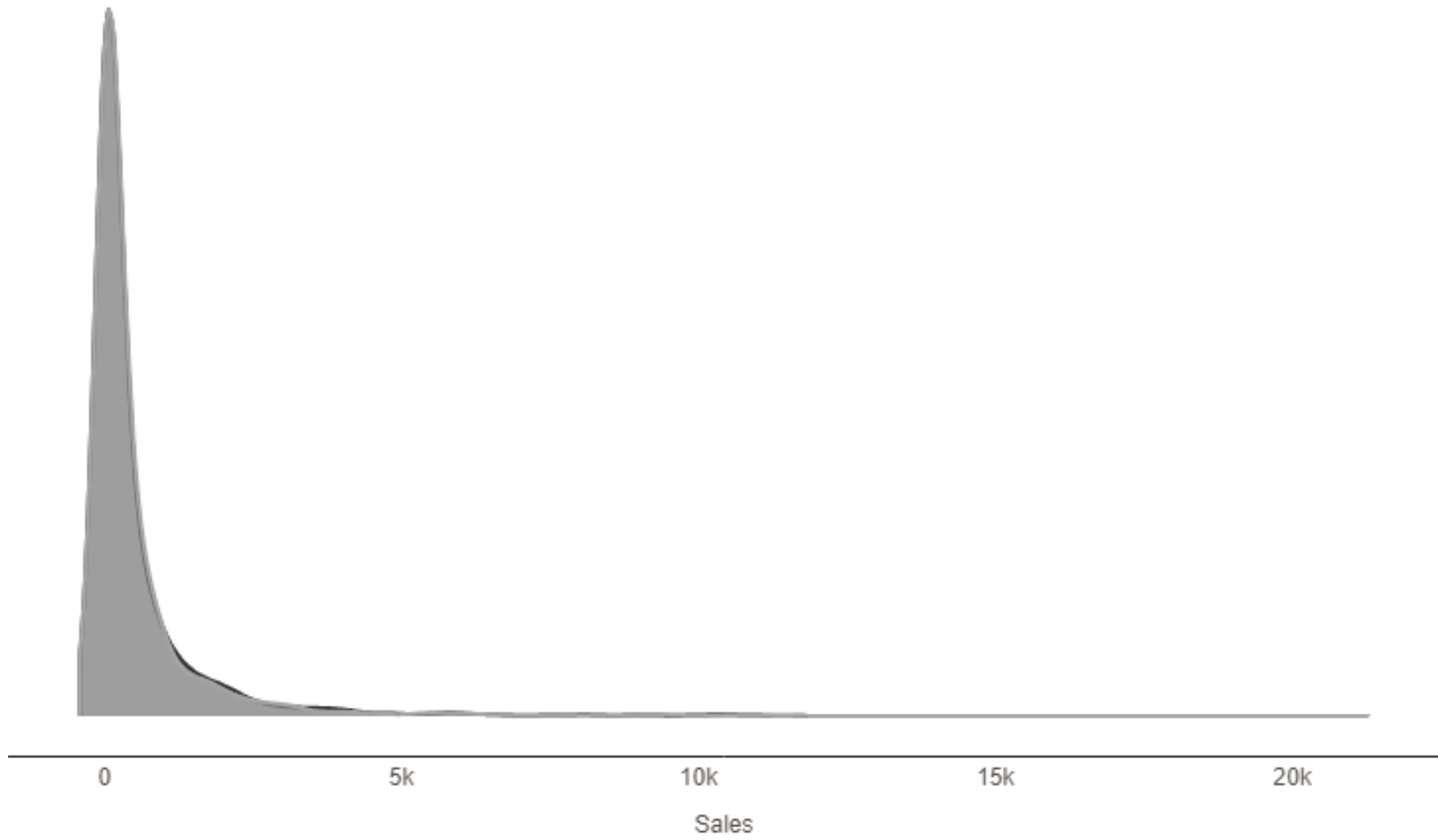


Unit Price Change



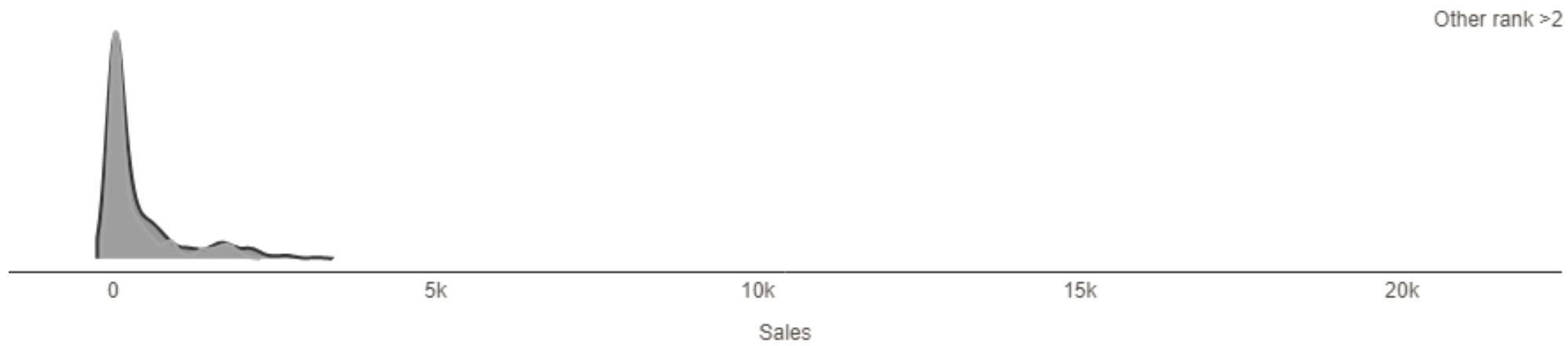
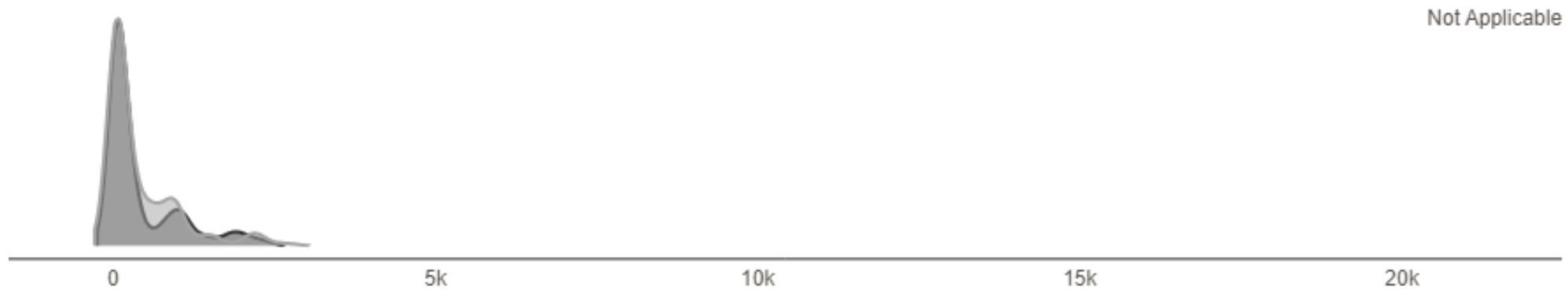
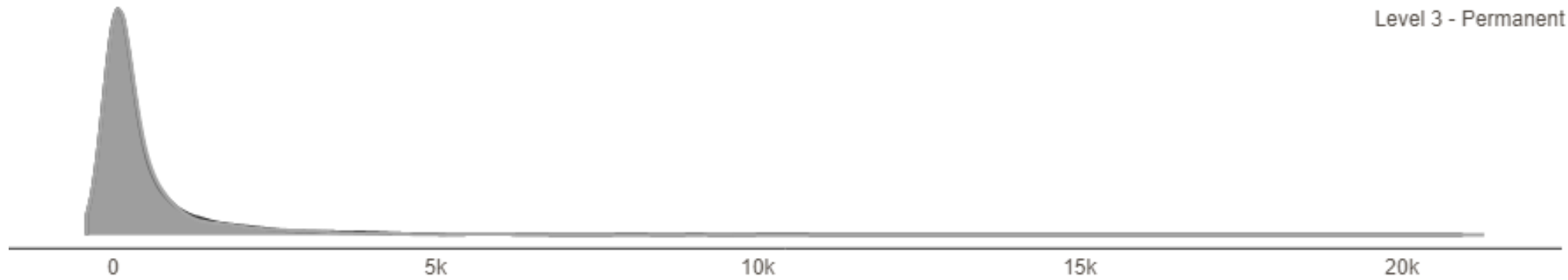
Hair Color
Sales in GBP, by observation
2015 vs 2016

2016
2015



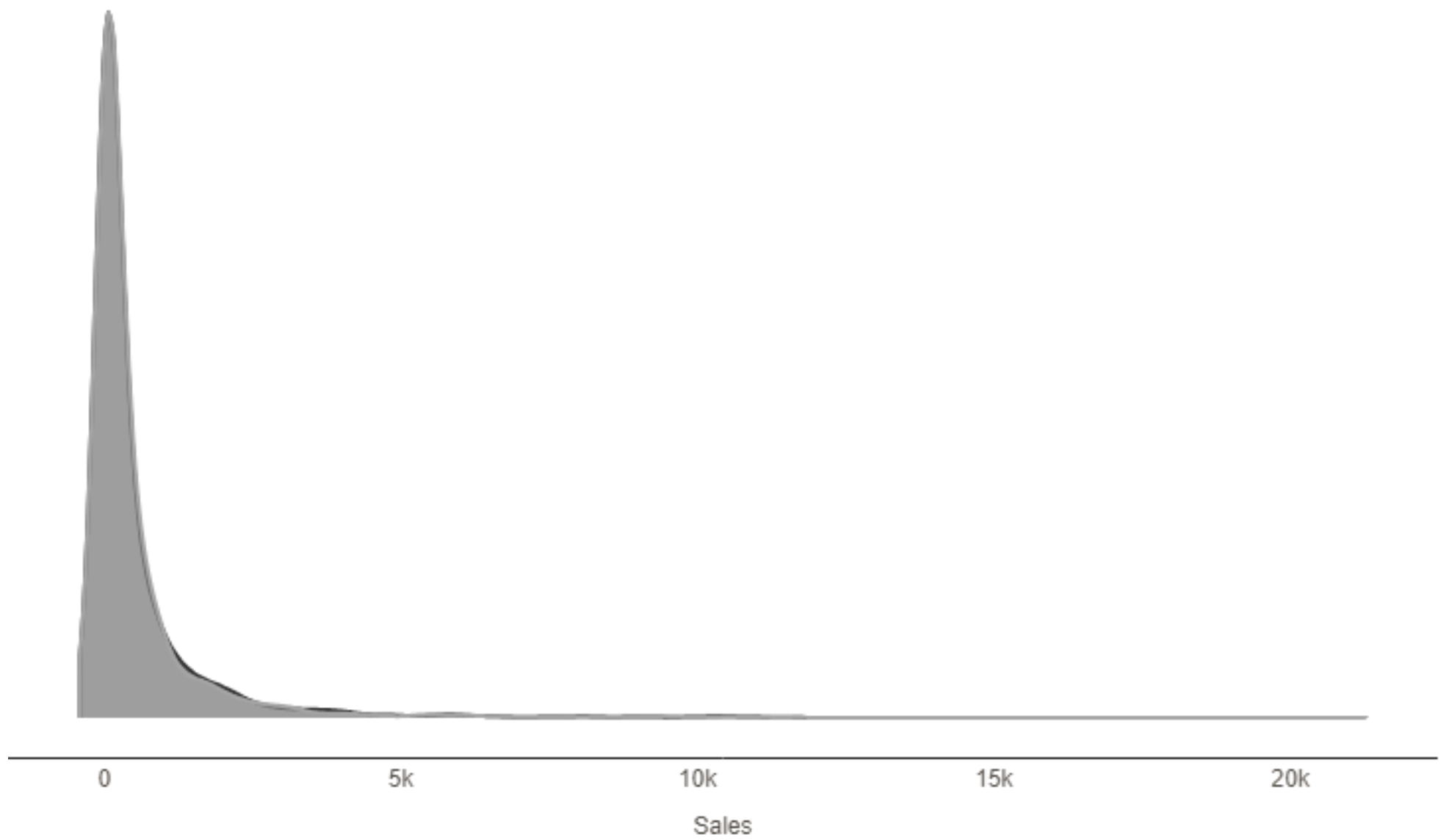
Hair Color
Sales in GBP, by observation by Duration
2015 vs 2016

Level 3 - Permanent
2016
2015



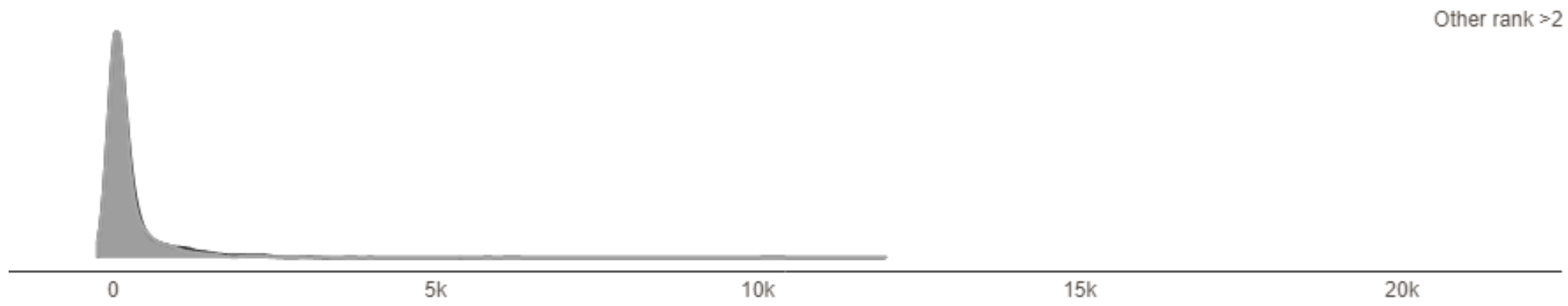
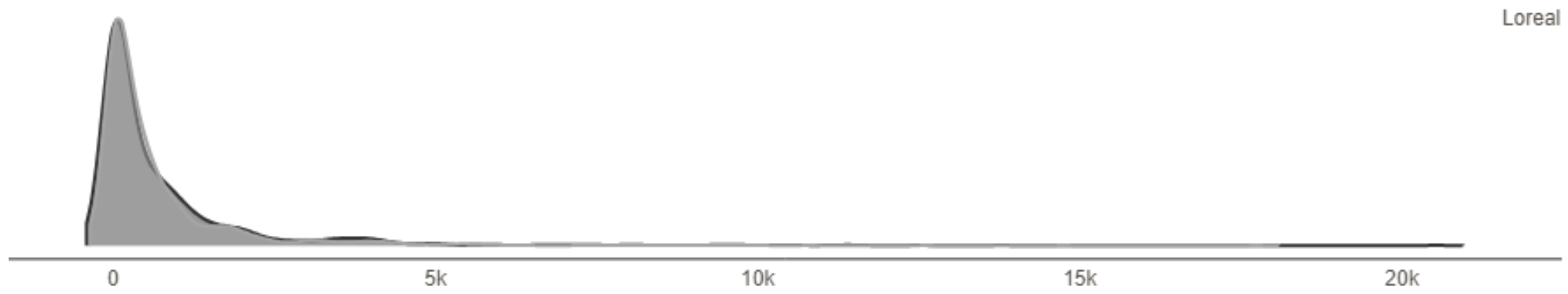
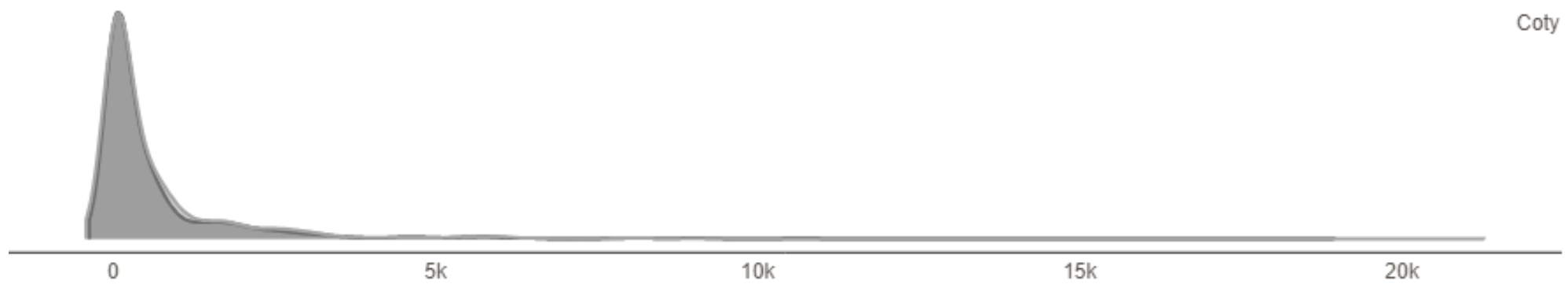
Hair Color
Sales in GBP, by observation
2015 vs 2016

2016
2015



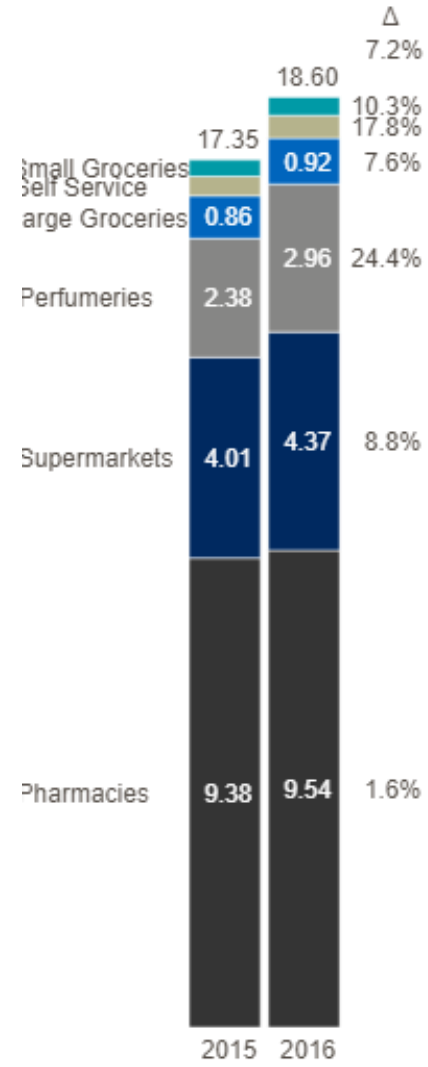
Hair Color
Sales in GBP, by observation by Company
2015 vs 2016

Coty 2016
 2015



Sales

Hair Color
 Units in m by Mkt like-for-like Color 2015 to 2016
 2015 to 2016

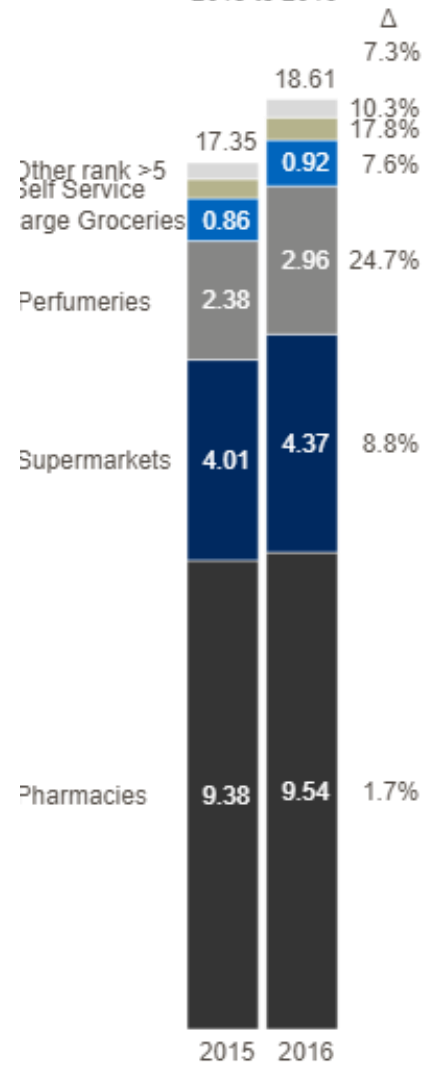


Hair Color

Bars: Unit Price in mGBP. Line: Sales in mGE
2015 to 2016



Hair Color
Units in m by Mkt
2015 to 2016



Hair Color
Units by Mkt in m
2015 to 2016



Hair Color
Sales in mGBP by Subbrand
2015 to 2016

