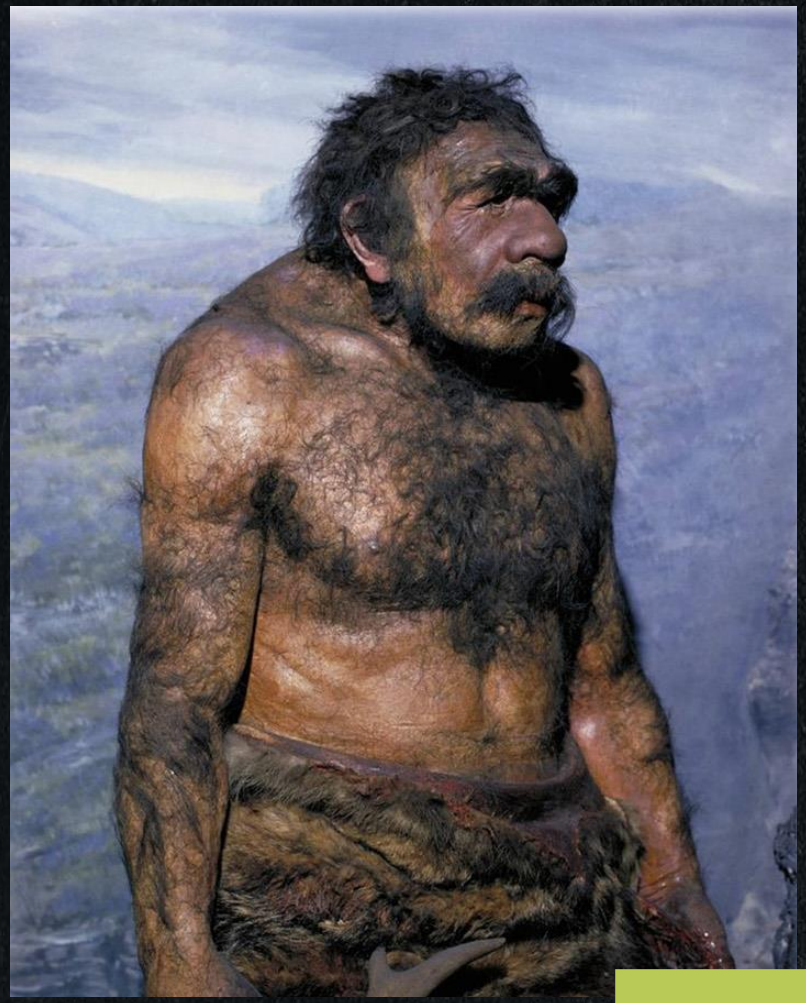
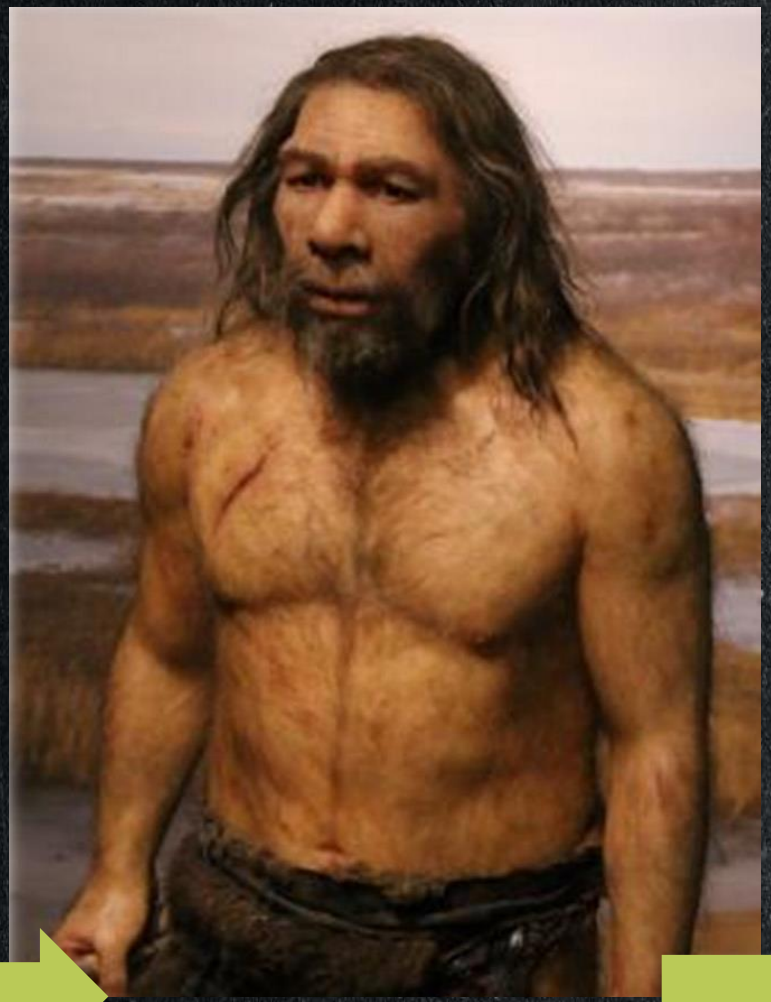
# PRODOTTI TRICOLOGICI PER IL MERCATO GLOBALE

DAVIDE BOLLATI
Chairman

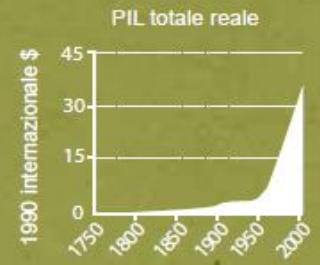
EVENTO KOSMETICA - 15 giugno 2017, Milano

davines



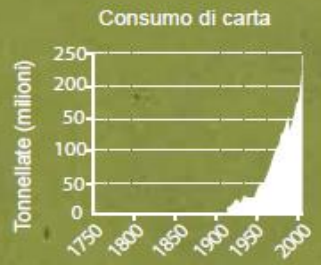


Popolazione
Persone (miliardi)
0
1
2
3
4
5
6
7
1750
1800
1850
1900
1950
2000

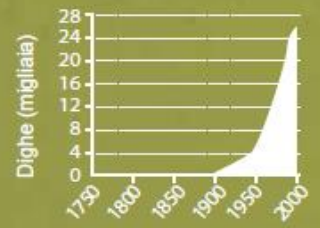

PIL totale reale
1990 internazionale $
0
15
30
45
1750
1800
1850
1900
1950
2000

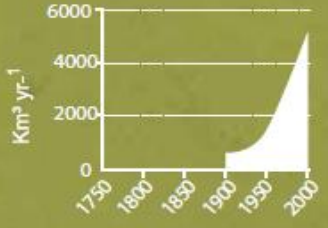
Investimenti diretti esteri
1998 US $ (miliardi)
0
100
200
300
400
500
600
700
1750
1800
1850
1900
1950
2000

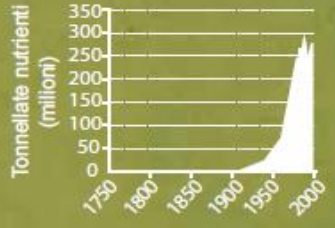
Popolazione urbana
Persone (miliardi)
0
2
4
6
8
10
1750
1800
1850
1900
1950
2000

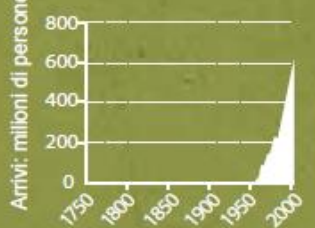

Consumo di carta
Tonnellate (milioni)
0
50
100
200
250
1750
1800
1850
1900
1950
2000

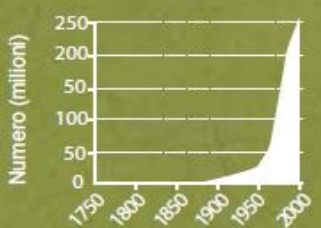
Ristoranti McDonald's
Numero (migliaia)
0
5
10
15
20
25
30
35
1750
1800
1850
1900
1950
2000

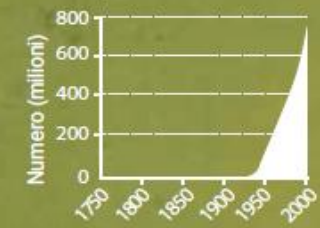

Sbarramento dei fiumi
Dighe (migliaia)
0
4
8
12
16
20
24
28
1750
1800
1850
1900
1950
2000

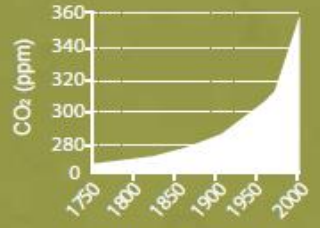

Consumo d'acqua
Km³ yr⁻¹
0
2000
4000
6000
1750
1800
1850
1900
1950
2000

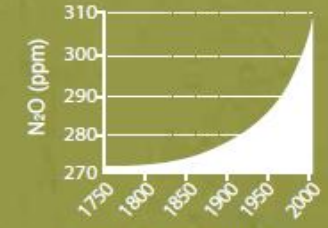

Impiego di fertilizzanti
Tonnellate nutrienti (milioni)
0
50
100
150
200
250
300
350
1750
1800
1850
1900
1950
2000

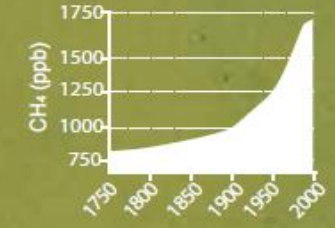

Turismo internazionale
Arrivi: milioni di persone
0
200
400
600
800
1750
1800
1850
1900
1950
2000

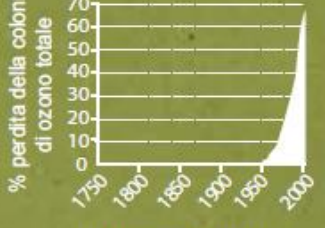

Comunicazione: telefoni
Numero (milioni)
0
50
100
200
250
1750
1800
1850
1900
1950
2000

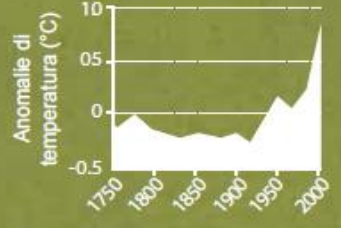

Trasporto: veicoli a motore
Numero (milioni)
0
200
400
600
800
1750
1800
1850
1900
1950
2000

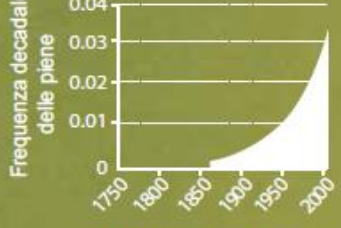

Atmosfera: concentrazione di CO₂
CO₂ (ppm)
0
280
300
320
340
360
1750
1800
1850
1900
1950
2000

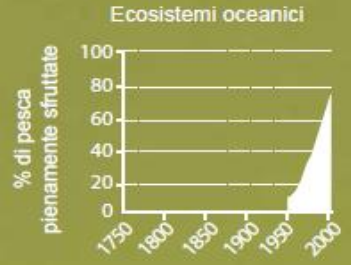

Atmosfera: concentrazione di N₂O
N₂O (ppm)
270
280
290
300
310
1750
1800
1850
1900
1950
2000


Atmosfera: concentrazione di CH₄
CH₄ (ppb)
750
1000
1250
1500
1750
1750
1800
1850
1900
1950
2000

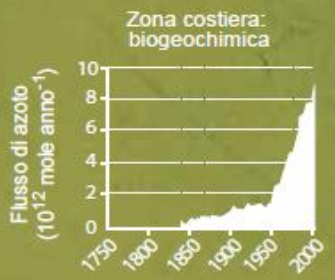

Atmosfera: esaurimento ozono
% perdita della colonna di ozono totale
0
10
20
30
40
50
60
70
1750
1800
1850
1900
1950
2000


Clima: temperatura superficiale media nell'emisfero nord
Anomalie di temperatura (°C)
-0.5
0
05
10
1750
1800
1850
1900
1950
2000

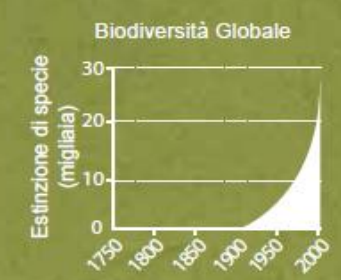

Clima: grandi inondazioni
Frequenza decadale delle piene
0
0.01
0.02
0.03
0.04
1750
1800
1850
1900
1950
2000


Ecosistemi oceanici
% di pesca pienamente sfruttate
0
20
40
60
80
100
1750
1800
1850
1900
1950
2000

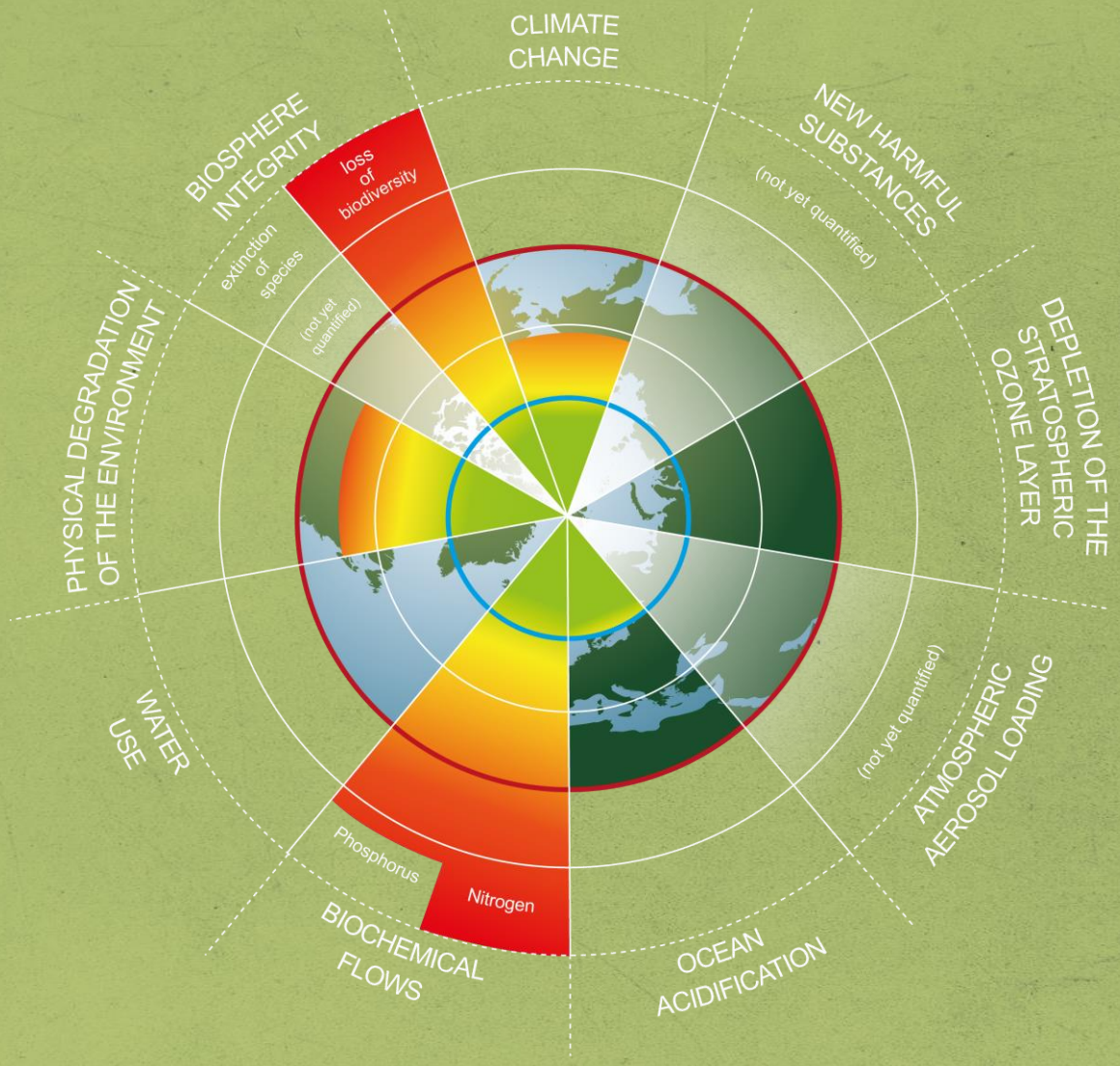
Zona costiera: struttura
Acquacoltura gamberetti milioni di tonnellate
2
12
22
32
1750
1800
1850
1900
1950
2000


Zona costiera: biogeochimica
Flusso di azoto ($10^{12}$ mole anno$^{-1}$)
0
2
4
6
8
10
1750
1800
1850
1900
1950
2000

Ecosistemi terrestri: quantità di terra coltivata
% Superficie Totale
0
25
50
1750
1800
1850
1900
1950
2000

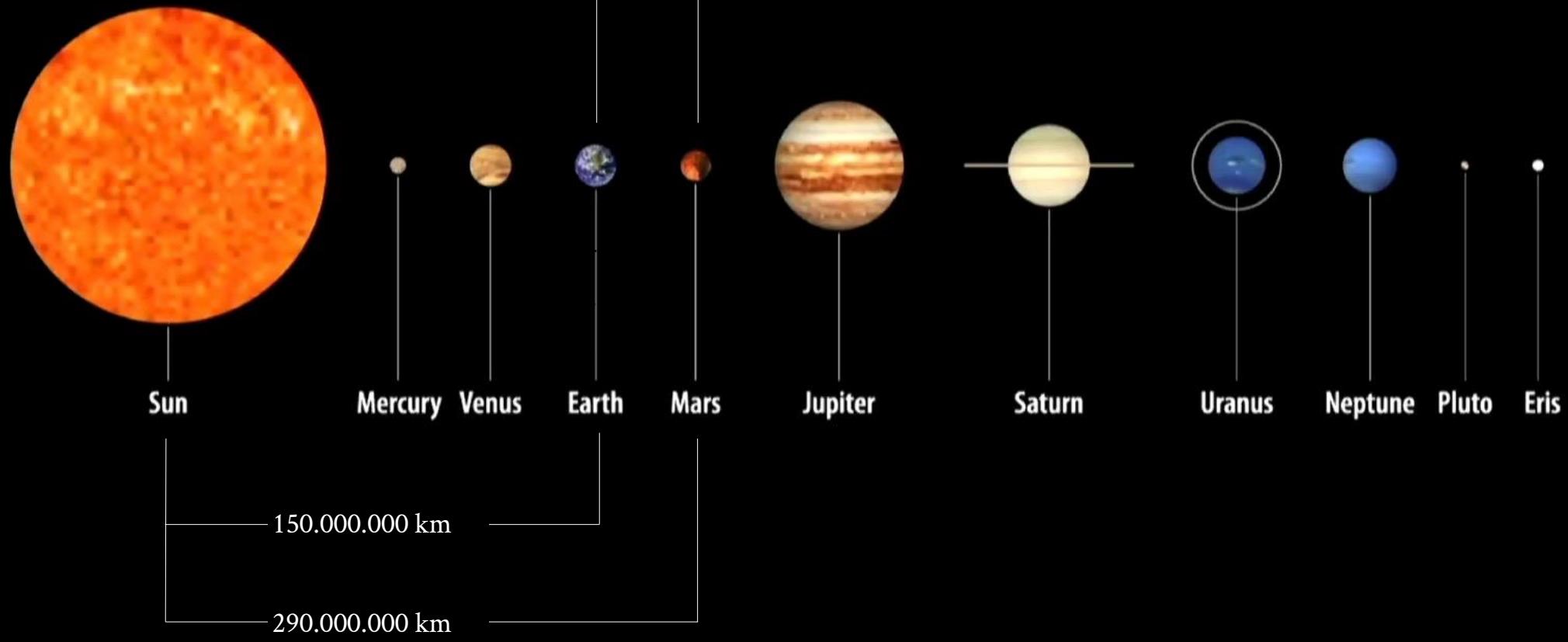

Biodiversità Globale
Estinzione di specie (migliaia)
0
10
20
30
1750
1800
1850
1900
1950
2000

Perdita Ecosistemi terrestri di foreste pluviali e boschi
% di valore dal 1700
0
10
20
30
1750
1800
1850
1900
1950
2000



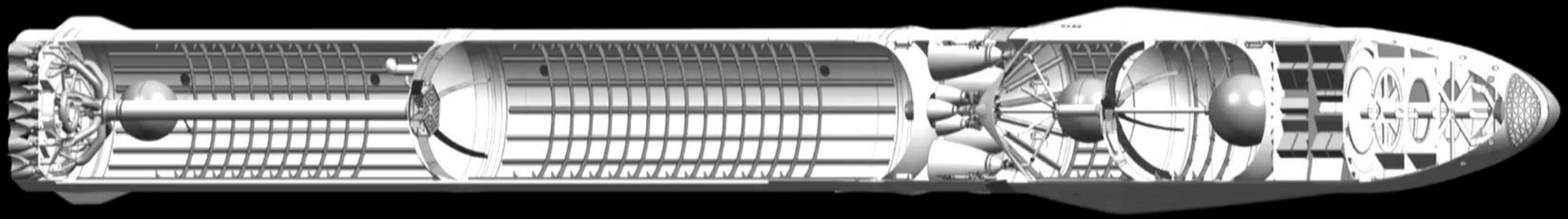

# PLANETARY BOUNDARIES

| | | |
|---|---|---|
| Diametro | 12.756 km | 6.792 km |
| Temperatura | -88C to 58C | -140C to 30C |
| Lunghezza del giorno | 24h | 24h40m |
| Popolazione | 7 miliardi | 0 |



| | $C_{12}H_{22.4}/O_2$ KEROSENE | $H_2/O_2$ HYDROGEN/OXYGEN | $CH_4/O_2$ DEEP-CRYO METHALOX |
|---|---|---|---|
| VEHICLE SIZE | ● | ● | ● |
| COST OF PROP | ● | ● | ● |
| REUSABILITY | ● | ● | ● |
| MARS PROPELLANT PRODUCTION | ✕ | ● | ● |
| PROPELLANT TRANSFER | ● | ● | ● |

● GOOD
● OK
● BAD
✕ VERY BAD



Carbon-fiber primary structure

Densified $CH_4$/O2 propellant

Autogenous pressurization

# VOLO PER MARTE

| | BOOSTER | TANKER | SHIP |
|---|---|---|---|
| FABRICATION COST | $230M | $130M | $200M |
| LIFETIME LAUNCHES | 1,000 | 100 | 12 |
| LAUNCHES PER MARS TRIP | 6 | 5 | 1 |
| AVERAGE MAINTENANCE COST PER USE | $0.2M | $0.5M | $10M |
| TOTAL COST PER ONE MARS TRIP (Amortization, Propellant, Maintenance) | $11M | $8M | $43 |

Cost Of Propellant: $168/t

Launch Site Costs: $200,000/launch

Discount Rate: 5%

Sum Of Costs: $62 M

Cargo Delivered: 450 T

Cost/ton to Mars: <$140,000

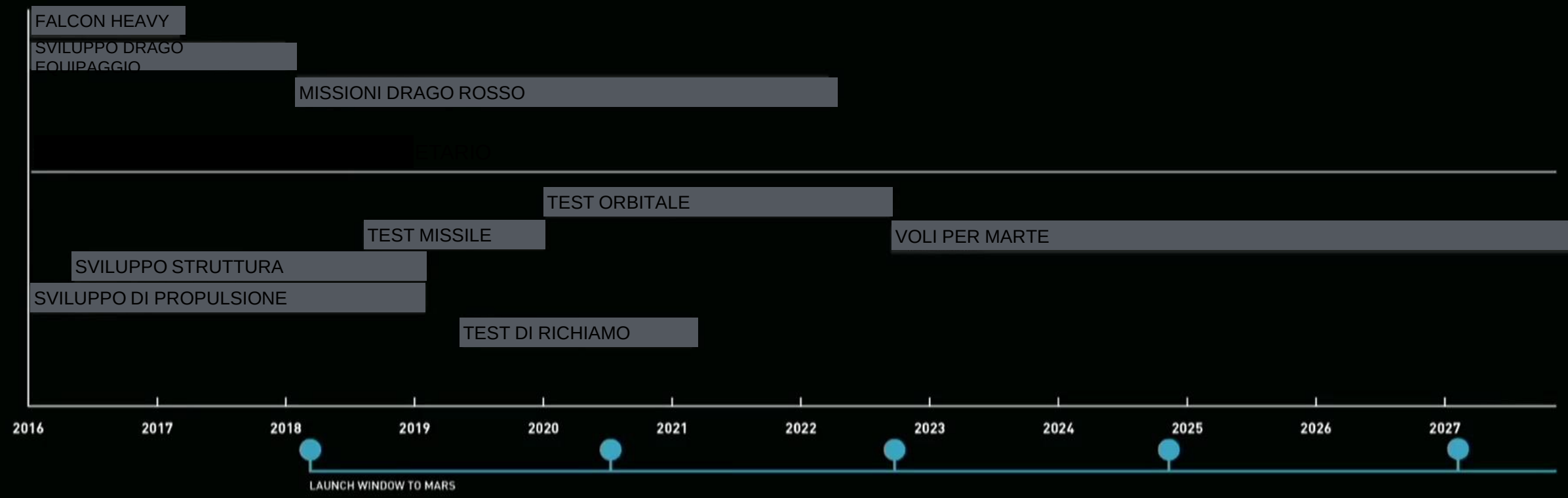
EARTH-MARS TRANSIT TIME (DAYS)
BY MISSION OPPORTUNITY

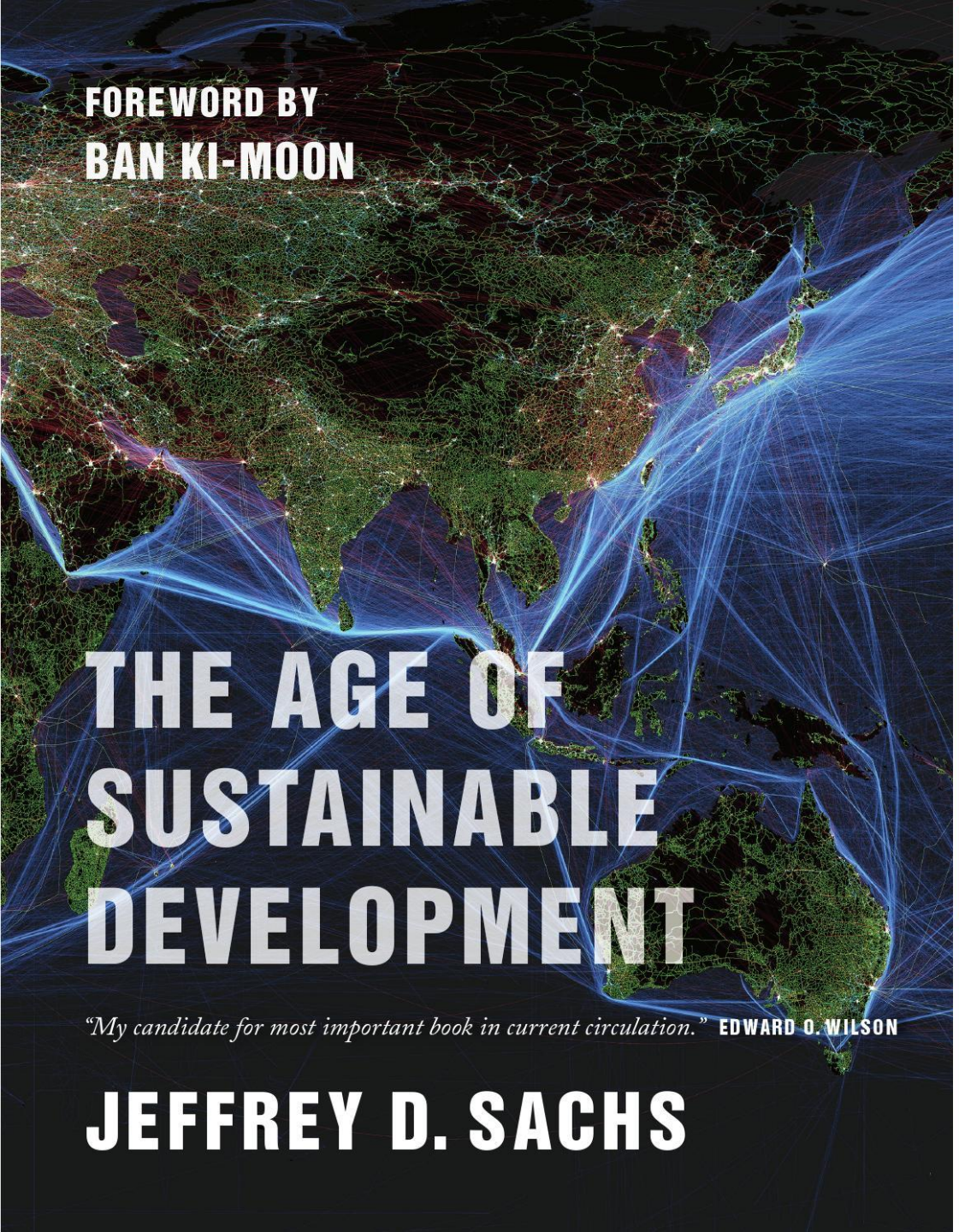
| YEAR | TRIP TIME (d) |
|---|---|
| 2020 | 90 |
| 2022 | 120 |
| 2024 | 140 |
| 2027 | 150 |
| 2029 | 140 |
| 2031 | 110 |
| 2033 | 90 |
| 2035 | 80 |
| 2037 | 100 |
| **AVERAGE** | **115** |

TMI DELTA V: 6 km/s
Mars Entry Velocity: 8.5 km/s

davines
SUSTAINABLE BEAUTY

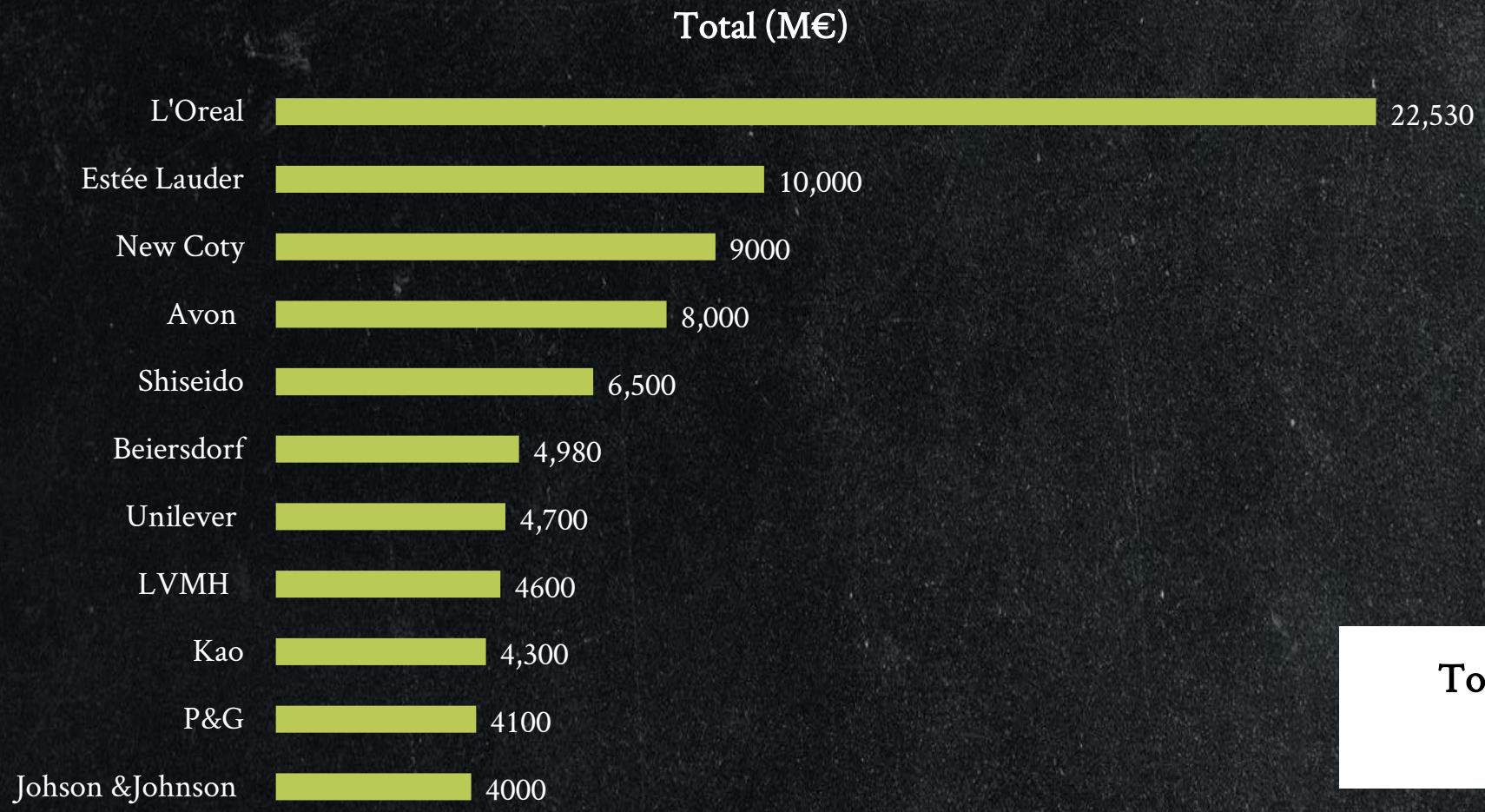
# PROGRAMMA TEMPORALE




FOREWORD BY
BAN KI-MOON
THE AGE OF SUSTAINABLE DEVELOPMENT
"My candidate for most important book in current circulation." EDWARD O. WILSON
JEFFREY D. SACHS

1 NO POVERTY
2 ZERO HUNGER
3 GOOD HEALTH AND WELL-BEING
4 QUALITY EDUCATION
5 GENDER EQUALITY
6 CLEAN WATER AND SANITATION
7 AFFORDABLE AND CLEAN ENERGY
8 DECENT WORK AND ECONOMIC GROWTH
9 INDUSTRY, INNOVATION AND INFRASTRUCTURE
10 REDUCED INEQUALITIES
11 SUSTAINABLE CITIES AND COMMUNITIES
THE GLOBAL GOALS
For Sustainable Development
12 RESPONSIBLE CONSUMPTION AND PRODUCTION
13 CLIMATE ACTION
14 LIFE BELOW WATER
15 LIFE ON LAND
16 PEACE AND JUSTICE STRONG INSTITUTIONS
17 PARTNERSHIPS FOR THE GOALS

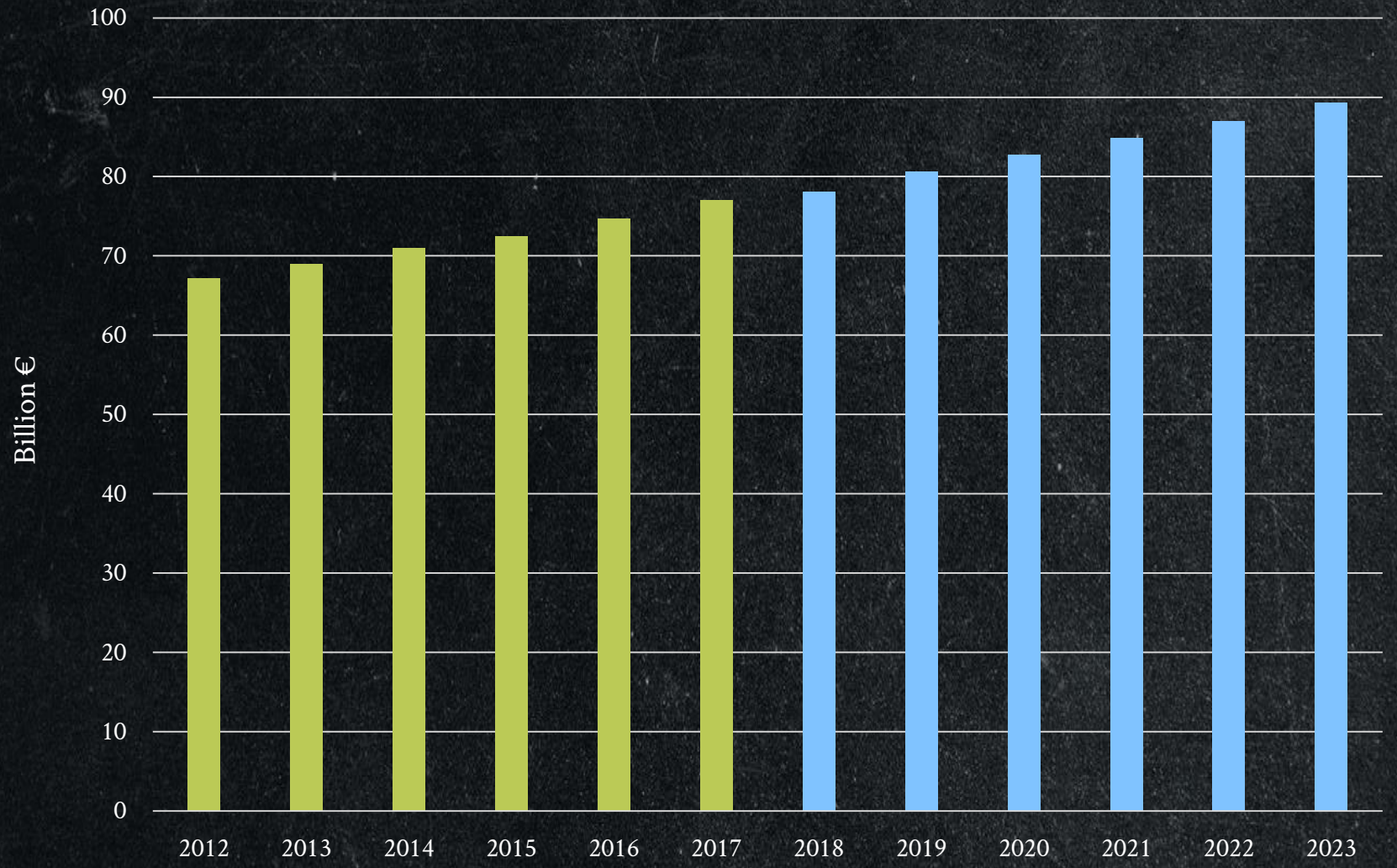
# WWD TOP 10 BEAUTY COMPANIES




**Total Global Beauty Market:**

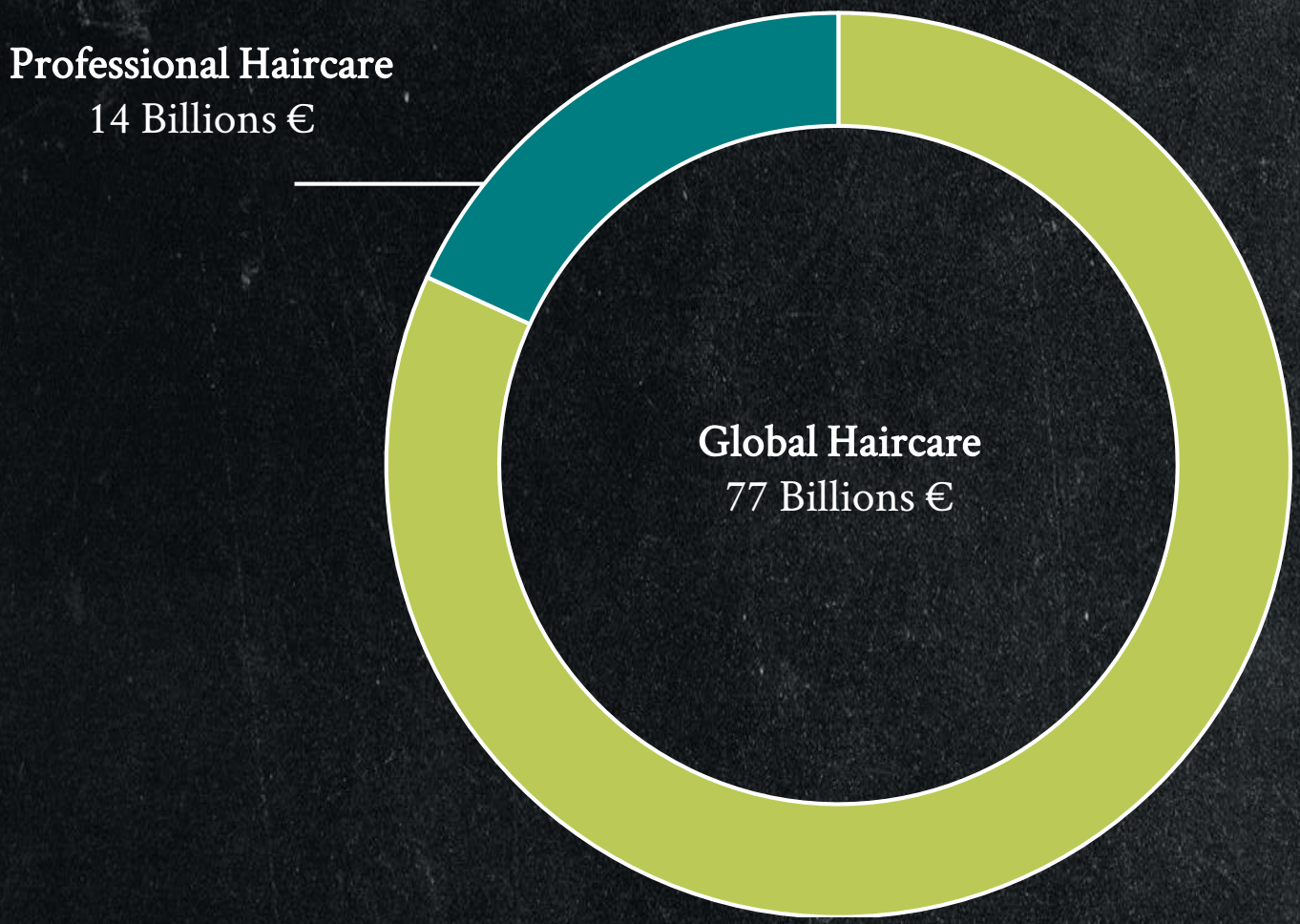
300 Billion €

# GLOBAL HAIRCARE MARKET SIZE EVOLUTION 2012-2013

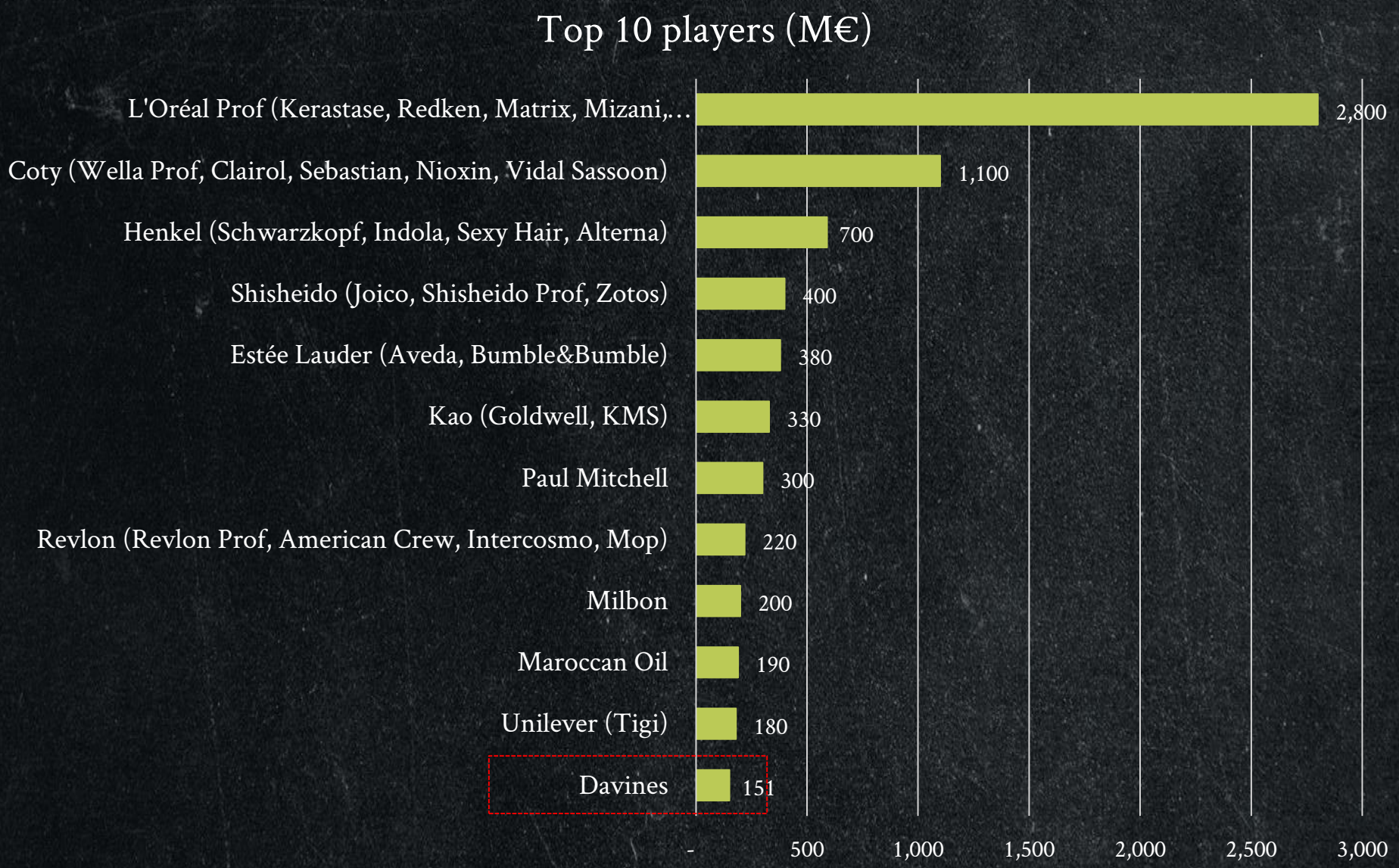



Source: Statista, 2017

# GLOBAL HAIRCARE MARKET SIZE 2017



# PROFESSIONAL MARKET- HAIR CARE



# PROFESSIONAL MARKET- HAIR CARE

# GLOBAL TRENDS IN HAIRCARE

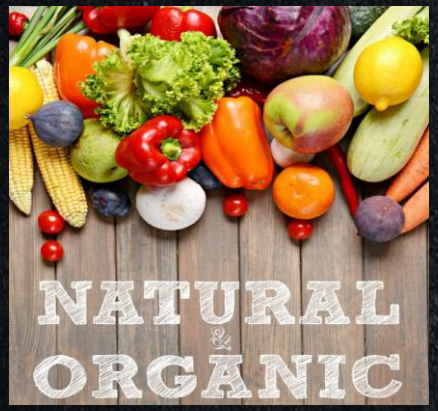
NATURAL & ORGANIC INGREDIENTS

ANTI-POLLUTION & DETOX

CUSTOMIZATION

# 1. NATURALE & BIOLOGICO

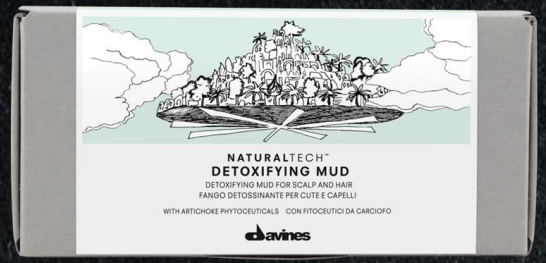
I consumatori cercano prodoti **naturali** e/o **biologici, gentili** e **sicuri.**
I trend sugli ingredient mostrano una sempre maggiore attenzione alla **tracciabilità**, alla **provenienza locale**, anche per ridurre la propria **carbon footprint** e dichiararsi **sostenibili**.



Più della metà delle donne ritiene molto importante usare prodotti hair care **naturali. Le consumatrici millennial** sono quelle che **investono di più nella categoria** – il **26% compra solo all-natural shampoos e conditioners**.

# 2. ANTI-POLLUTION & DETOX

La crescente consapevolezza dell'inquinamento dell'aria e i suoi impatti sull'ambienete e sulla salute stanno stimolando la domanda dei consumatori anche nel settore hair care.
I consumatori a livello globale si preoccupano degli effetti dell'inquinamento sui propri capelli, anche se gli anti-pollution claims appaiono ancora solo sull'1% dei lanci.
La coincidenza fra **anti-pollution** e **domanda per prodotti beauty green** ha fatto crescere la presenza di **ingredienti anti-pollution** in prodotti che ora mostrano anche **natural** and **organic claims**.



*URBAN ANTIDOTES*

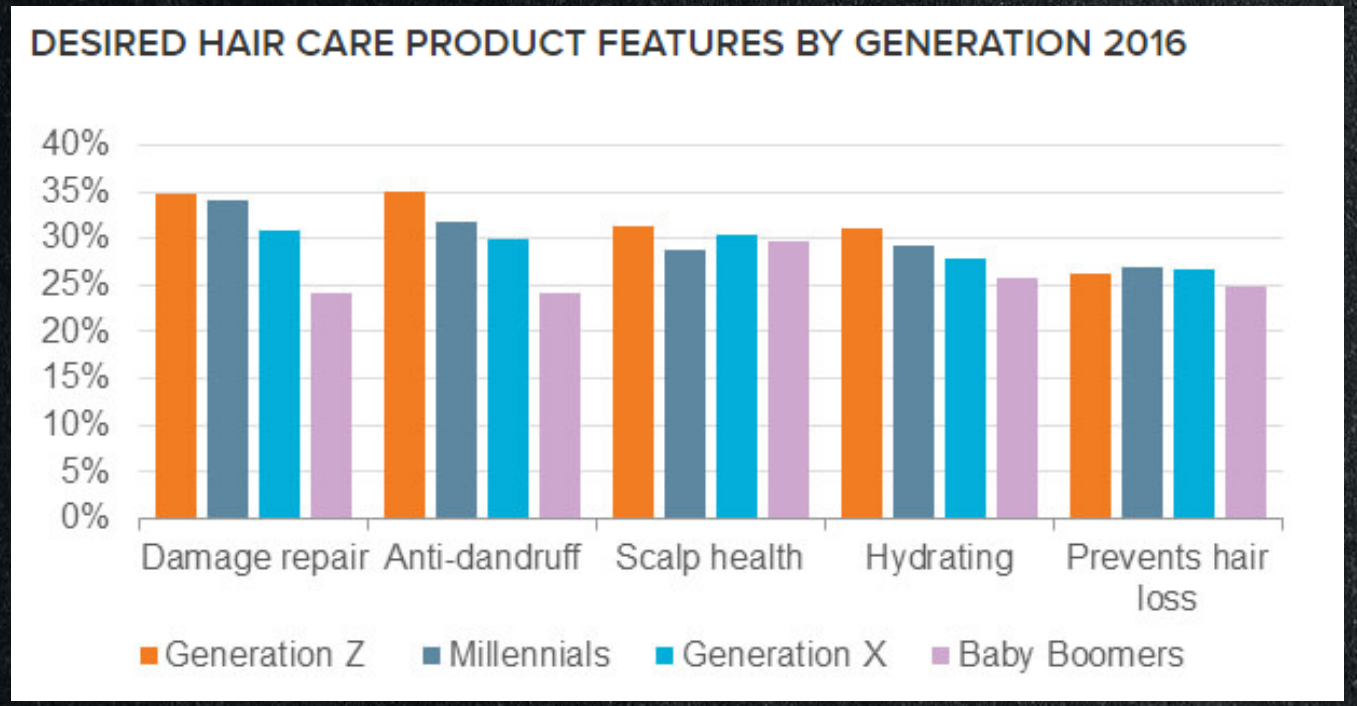
*POLLUTION PREVENTION*

*NATURAL SUSTAINABLE*

# 3. CUSTOMIZATION

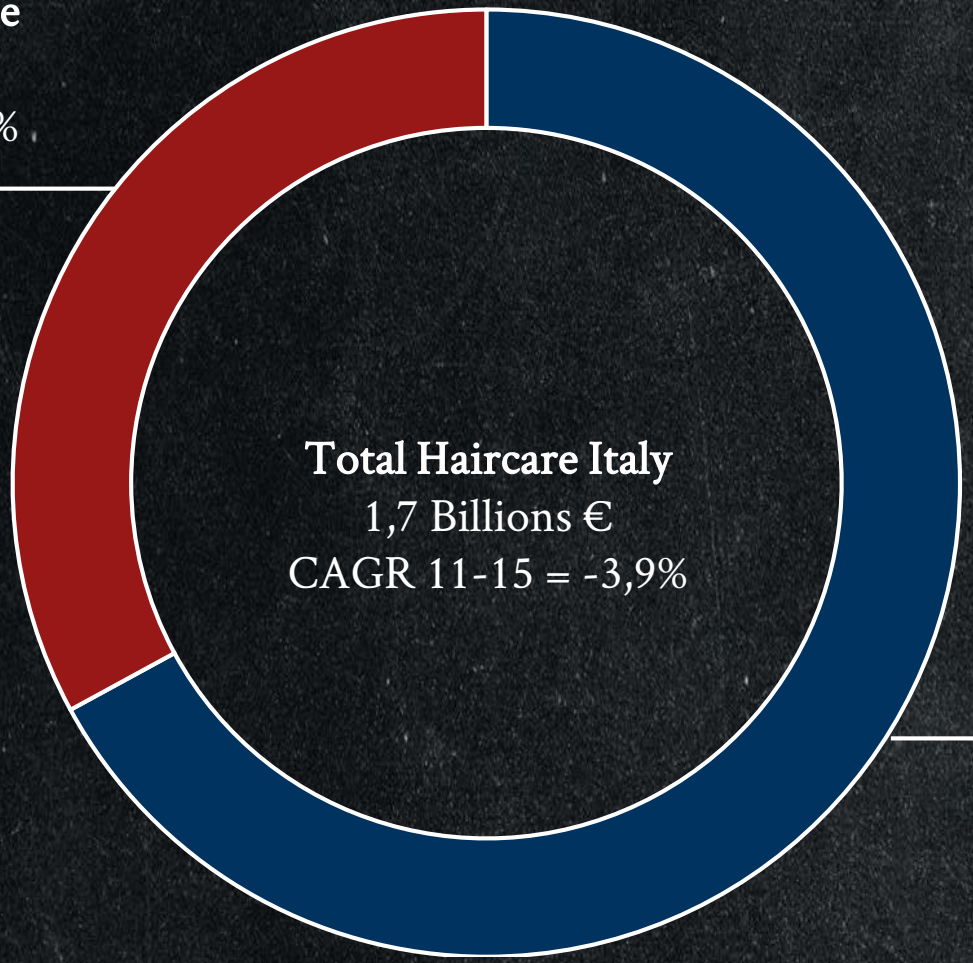
**Formulazioni individuali, consulenza digitale sui siti dei brand e dei retailer, smart devices** e apps.
→ Se un health tracker può ricordarti di bere acqua, non può forse ricordarti di mettere una crema?

La domanda dei consumatori si sta spostando da un **livello di customizzazione** "suitable for me" a uno **'made for me'**.
→ Top features frai giovani consumatori: soluzioni **damage repair** e **anti-forfora**.
→ Over 35s: una **scalp health** complessiva, compresa la preoccupazione per la **hair loss** in entrambi i generi.



# MERCATO PROFESSIONALE HAIRCARE IN ITALIA

**Professional Haircare**
**560 Millions €**
CAGR 11-15 = -6,0%

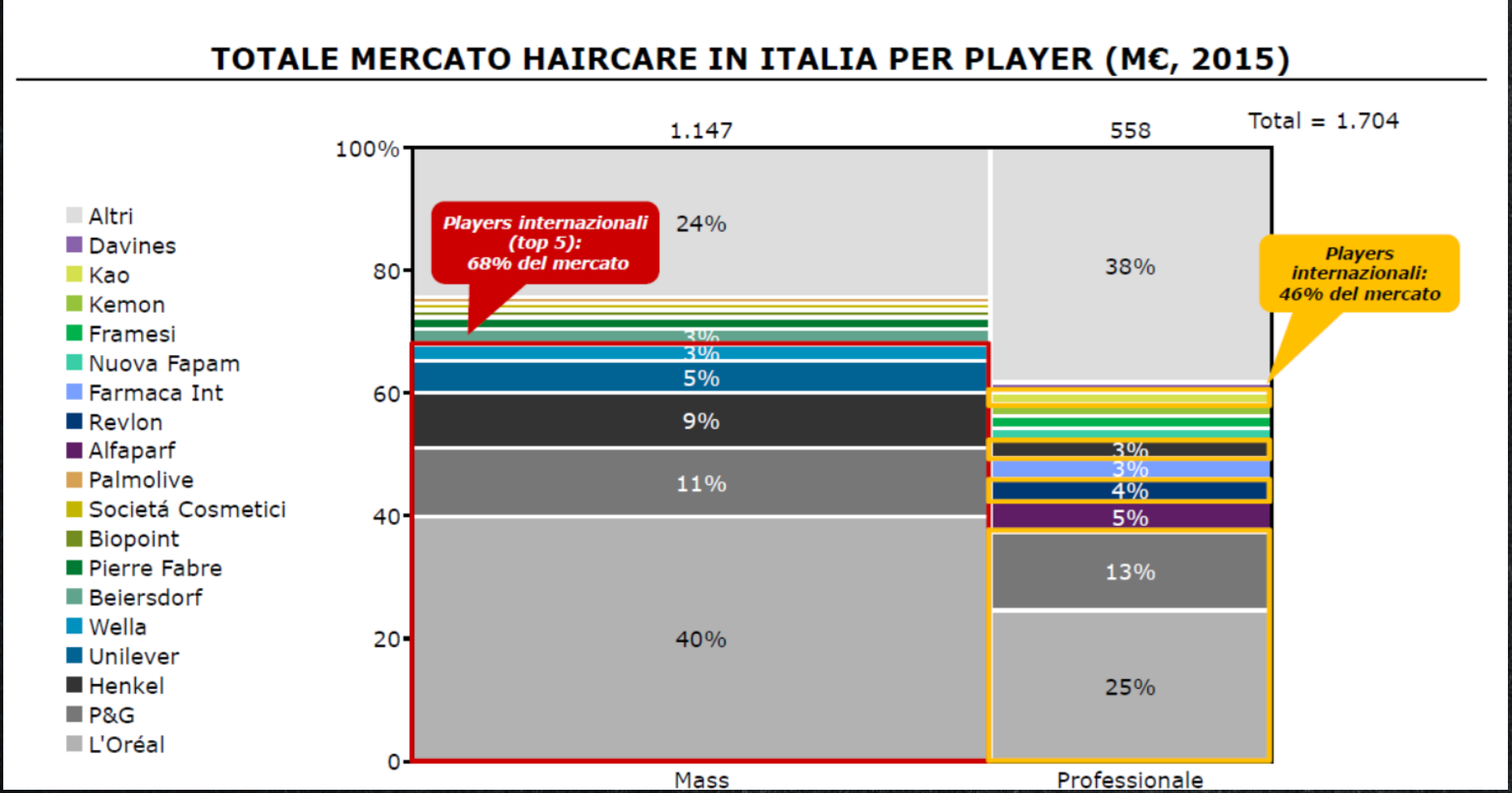



**Mass Market**
**1,14 Billions €**
CAGR 11-15 = -2,7%

Source: Bain, 2017

# MERCATO PROFESSIONALE HAIRCARE IN ITALIA

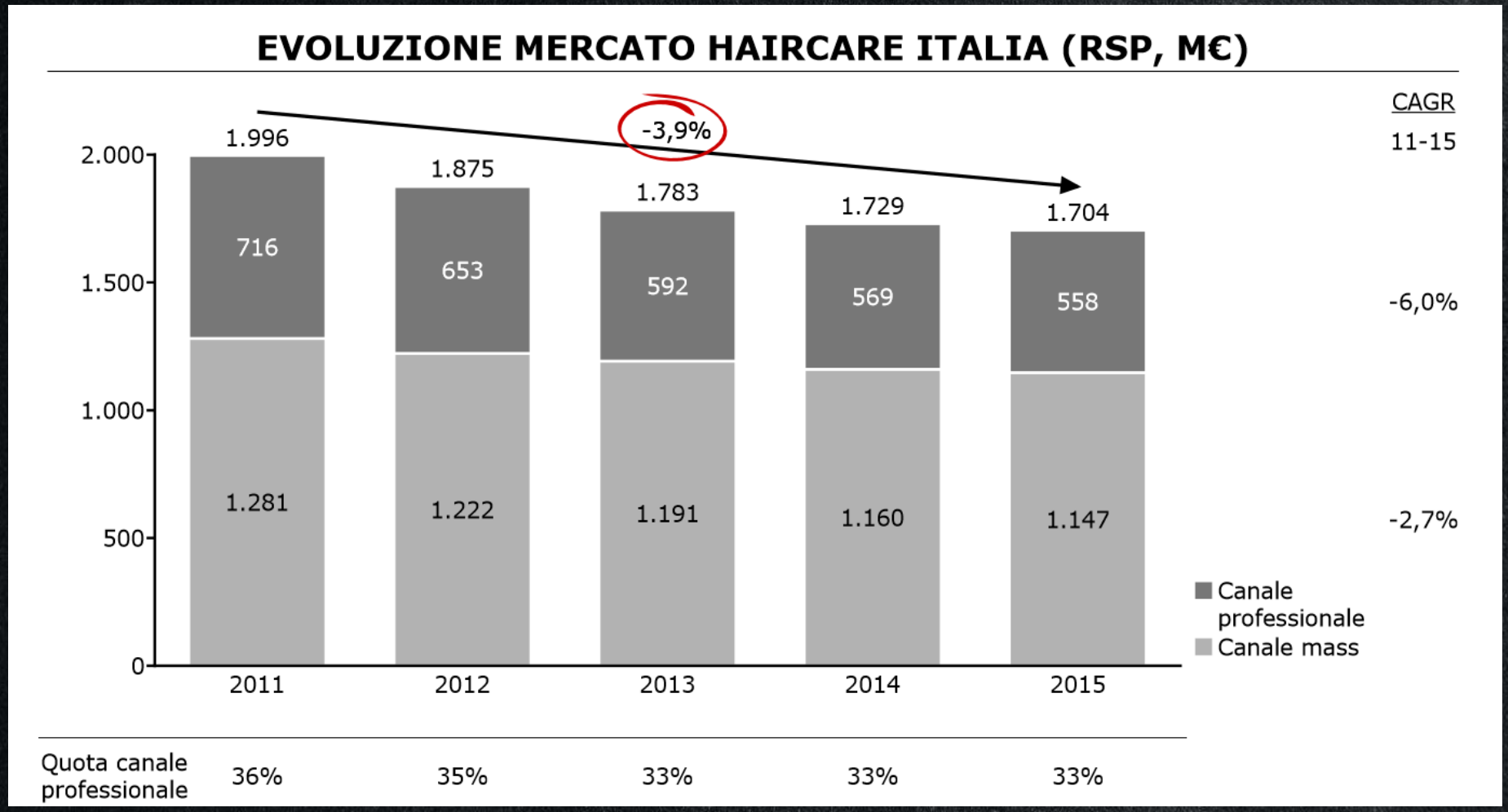
Il mercato haircaretotale è in mano a 3 player globali, L'Oreal, P&G e Henkel, che detengono il ~54% di quota




Source: Bain, 2017

# MERCATO PROFESSIONALE HAIRCARE IN ITALIA

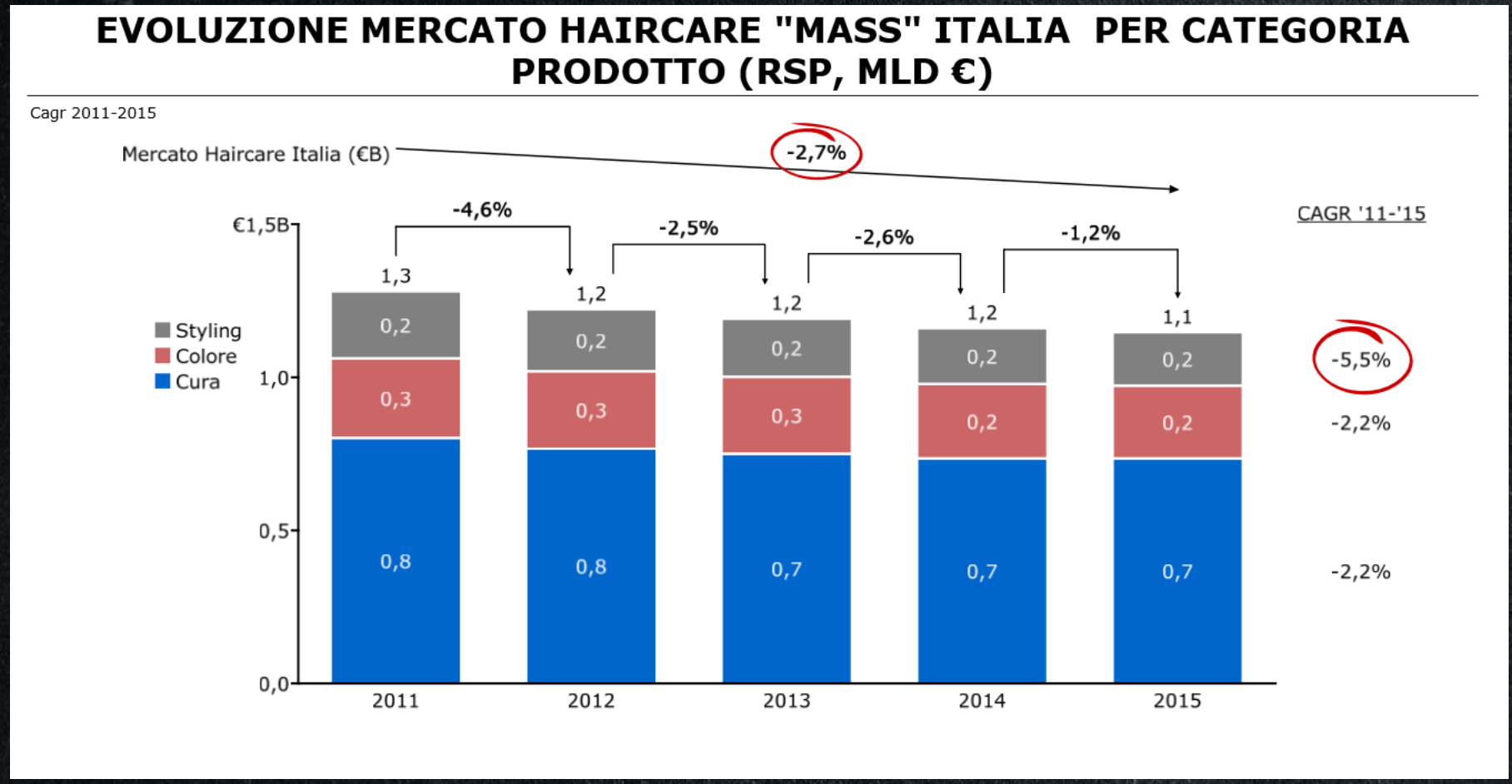
Mercato haircareItalia in calo; forte contrazione del canale professionale che perde quota vs canale "mass"




Source: Bain, 2017

# MERCATO PROFESSIONALE HAIRCARE IN ITALIA

Canale Mass vale 1,1Mld€nel 2015 (Cagr11-15:-2,7%); categoria cura pesa ~64% del mercato

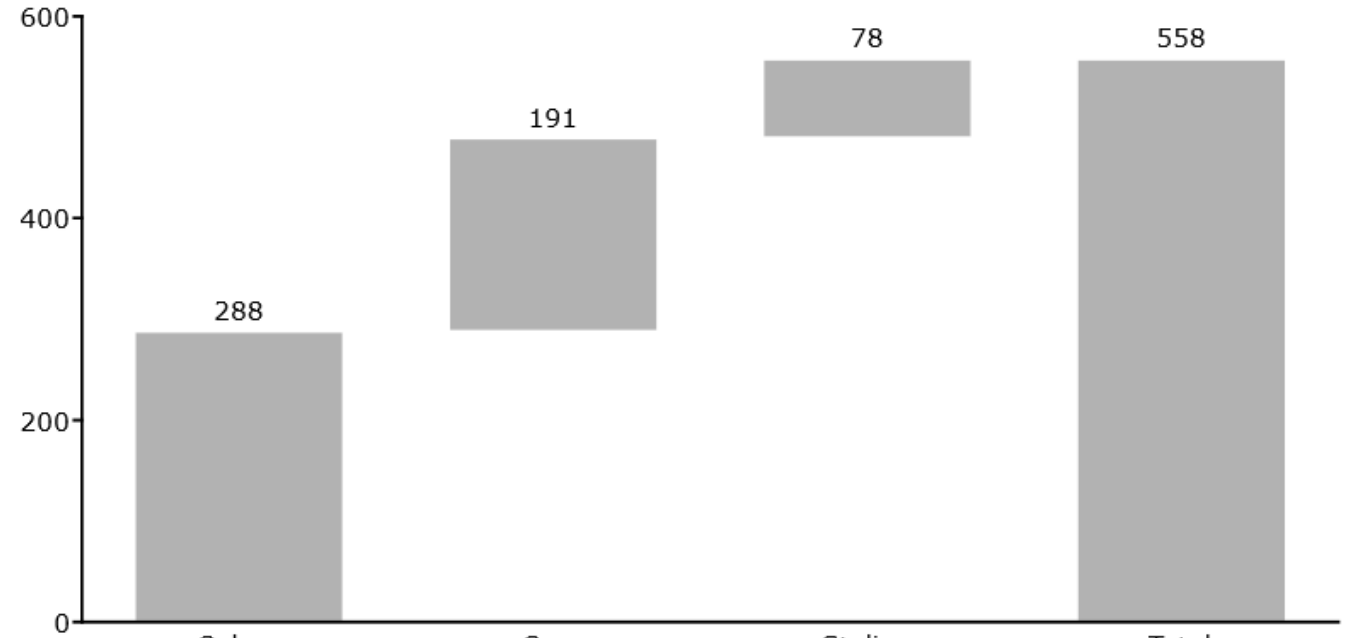



Source: Bain, 2017

# MERCATO PROFESSIONALE HAIRCARE IN ITALIA

Categoria colorazione pesa il 52% del mercato professionale; 34% cura e 14% style

**SEGMENTAZIONE MERCATO HAIRCARE PROFESSIONALE ITALIA PER CATEGORIA PRODOTTO (RSP, M€, 2015)**




| | Colore | Cura | Styling | Total |
|---|---|---|---|---|
| % rivendita | 0% | 35% | 35% | 17% |

Source: Bain, 2017

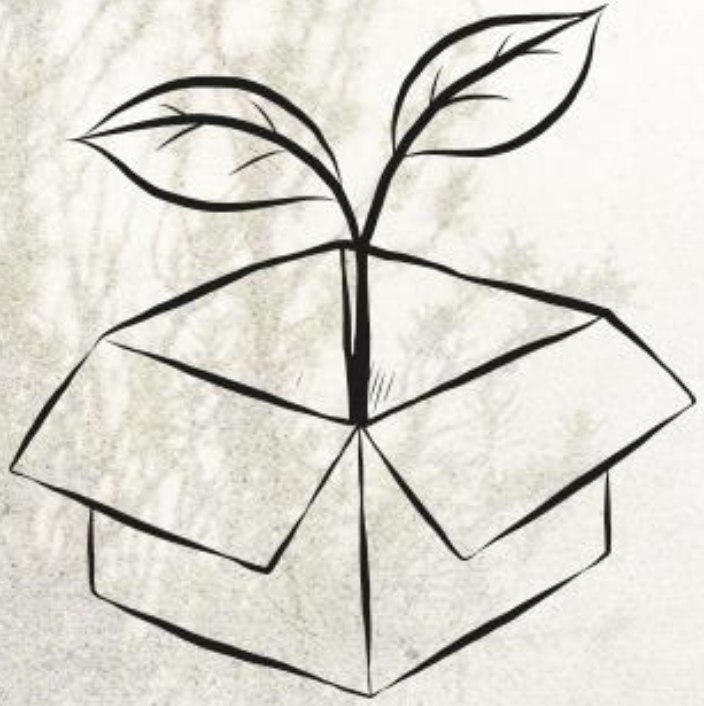
davines

# Certified

Corporation

davines

[ comfort zone ]



davines

FOR PROFIT COMPANY'S GOAL:

*distribute dividends to shareholders.*

Certified B Corporation™

*a company that aims to **EARN PROFIT** and to **HAVE A POSITIVE IMPACT** on society and environment*

B the change

NON -PROFIT ORGANIZATION'S GOAL:

*have a positive impact on society and environment, no commitment to a sustainable business model*

# ALTRE BCORP del SETTORE BEAUTY in ITALIA

HERBATINT PERMANENT HAIRCOLOUR

SKIN CARE PRODUCTS

TRADING OF NATURAL BEAUTY CARE PRODUCTS

BRUSH AND COMBS IN NATURAL WOOD

# ANALISI BASELINE PRODOTTI

**SLCA** una metodologia che ci consente di calcolare il profilo di sostenibilita di un prodotto

- Impatto del prodotto lungo le fasi del suo intero cilco di vita
- Rispetto delle condizioni di sistema

| Scientific Wording | Everyday Language |
|---|---|
| Eliminate our contribution to systematic increases in concentration of substances from the earth's crust. | We cannot dig up stuff from the earth at a rate faster than it naturally returns and replenishes. |
| Eliminate our contribution to systematic increases in substances produced by society. | We cannot make stuff at a rate faster than it takes to naturally break down into the environment. |
| Eliminate our contribution to systematic physical degradation of nature. | We cannot cause destruction to the planet at a rate faster than it takes to re-grow. |
| Remove barriers that undermine humans' ability to meet their need worldwide. | We cannot do things that cause others to not be able to fulfill their basic needs. |

# CARTA RICERCA

Sicurezza

Efficacia

Alta qualità

Sostenibilità

Tracciare la supply chain

Origine naturale,

Biologica quando possibile

Biodegradabilità

Conservazione della biodiversità

FORMULATION

Risparmio di materia prima

Easy pack

Facilità di riciclo

Materiale riciclato

Materiali biobased

Logistica

Riutilizzo

Selezione dei fornitori

LCA

PACKAGING

# IMPEGNO ETICO DA PARTE DEI FORNITORI

Davines dà la priorità ai fornitori che condividono valori simili, per generare delle sinergie virtuose e a vantaggio di entrambe le parti, della società e dell'ambiente.

**42%**

dei principali fornitori hanno con un sustainability range «eccellente» or «sopra la media»

**65%**

dei principali fornitori si trovano entro i 200 km dallo stabilimento

# IMPEGNO A LIVELLO LOCALE – SLOW FOOD

In collaborazione con Slow Food, nella linea Davines Essential Haircare ogni famiglia contiene un ingrediente attivo proveniente da un Presidio, che tutela dall'estinzione determinate piante e supporta la biodiversità.

# KPI

## MATERIA PRIMA

- Ingredienti naturali
- Ingredienti naturali modificati
- Ingredienti sintetici
- Ingredienti altamente biodegradabili

## TRACCIABILITA' DEGLI INGREDIENTI

- Da produttori approvati
- Da messi geolocalizzate

## PACKAGING

- Da risorse rinnovabili
- Da risorse non rinnovabili
- Materiali riciclabili
- Rotazione packaging con compensazione di CO2

THANK YOU!