

Maison Hébé – Market Pressure Review

Reporting Month: April 2026

Executive Summary

SKU	Positioning	Visibility	Discount	Substitution
L'Éclat d'Or	●	●	●	●
Voile Invisible SPF 50	●	●	●	●
Source de Jeunesse	●	●	●	●
Renaissance de Nuit	●	●	●	●
Regard Infini	●	●	●	●

Portfolio Diagnosis

Market pressure within Maison Hébé remains concentrated on a limited number of SKUs rather than across the portfolio. The current pressure pattern is no longer driven by isolated pricing events. It reflects a reinforcing interaction between weaker competitive separation, lower-price visibility, persistent discounting, and higher substitution exposure on a narrow SKU subset.

Where Pressure Is Concentrated

L'Éclat d'Or and **Voile Invisible SPF 50** continue to show the clearest structural pressure. In both cases, weaker visible price positioning is being reinforced by lower-price visibility, sustained discount presence, and narrower separation from nearby alternatives. This is increasing the likelihood that lower visible price states become the effective market reference rather than temporary deviations.

Where Stability Is Maintained

Source de Jeunesse, **Renaissance de Nuit**, and **Regard Infini** remain structurally stable across the core pressure indicators shown on this page. These SKUs continue to maintain premium visibility, controlled discount behavior, and sufficient separation within the value ladder, allowing them to support the intended premium structure of the portfolio.

Primary Risk

The primary risk is not immediate additional price decline, but the continued normalization of lower visible price states on the pressured SKUs. Once those lower states become the effective market reference, restoring premium positioning becomes materially more difficult and requires more than isolated price correction.

Priority Actions

Priority should be placed on disrupting the reinforcing pressure cycle affecting L'Éclat d'Or and Voile Invisible SPF 50. This includes:

- Restoring clearer competitive separation
- Reducing lower-price visibility
- Reducing persistent discount pressure
- Preventing substitution pressure from strengthening further

At the same time, maintaining current conditions across the remaining SKUs is important to preserve overall portfolio stability.

Forward Monitoring

Ongoing monitoring should focus on whether:

- Lower-price visibility remains dominant
- Discounting stays persistent rather than episodic
- Competitor proximity and substitute density continue to increase

These factors will determine whether current pressures remain contained or begin to broaden.

Competitive Price Positioning

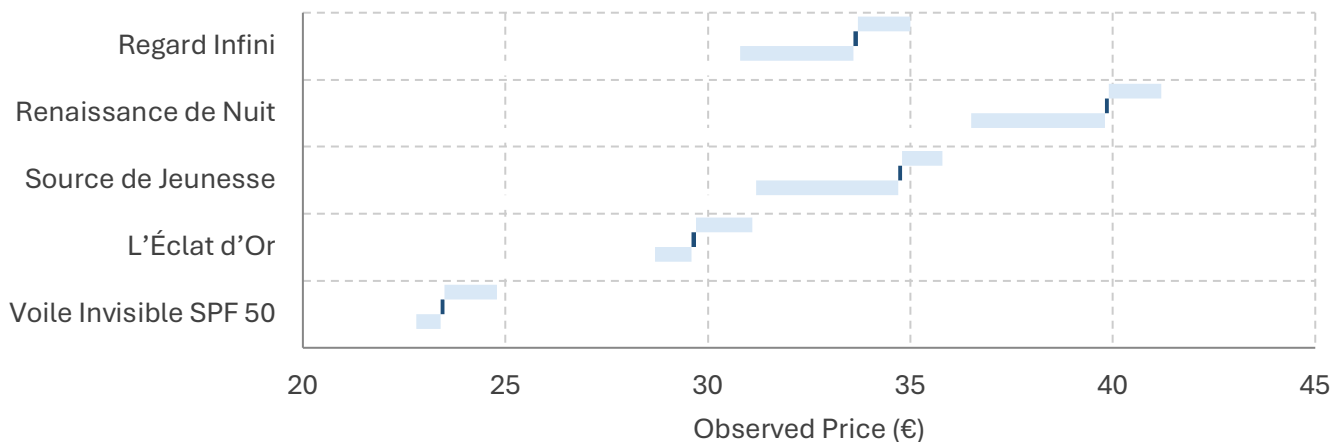
Maison Hébé maintains its intended premium positioning on three SKUs, while two SKUs show reduced competitive separation relative to the observed competitor set.

Competitive Positioning — SKU View

SKU	Competitive Position	Price Gap ¹ vs. Closest Competitor ²	Tier Integrity
Voile Invisible SPF 50	Within the upper-mid competitive range	There is no consistent premium gap versus upper-mid competitors	Broken
L'Éclat d'Or	At the lower bound of the premium tier	The gap versus the closest premium competitor is narrow and occasionally eliminated	At risk
Source de Jeunesse	Within the mid-range of the premium tier	The gap versus the closest premium competitor remains stable and positive	Maintained
Regard Infini	Within the mid-range of the premium tier	The gap versus the closest premium competitor remains stable and positive	Maintained
Renaissance de Nuit	At the upper end of the premium tier	The gap versus the closest premium competitor is consistently strong	Fully Maintained

Observed Competitive Price Range

This chart shows the observed competitor price range for each monitored SKU, with the Maison Hébé observed price positioned inside that range for comparison. The competitor range shows the spread of relevant visible alternatives, while the Maison Hébé marker shows where the brand currently sits within that comparison band.



¹ Gap strength should be interpreted relative to category price dispersion, with identical absolute gaps representing different levels of competitive separation depending on category pricing density.

² The closest competitor is defined as the lowest-priced directly comparable product within the same category and channel visibility set during the observation window.

Observed Competitive Price Support

This table shows the observed Maison Héb  price against the closest relevant competitor reference for each monitored SKU. It is designed to show whether premium separation remains clear, narrow, or no longer consistently visible.

SKU	Maison H�b� Observed Price	Closest Competitor Observed Price	Price Gap	Gap State	Comparison Context
Voile Invisible SPF 50	�23.10	�23.30	-�0.20	No consistent premium separation	Same-category visible competitor set
L'�clat d'Or	�29.50	�29.00	�0.50	Narrow and occasionally eliminated	Same-category premium comparison set
Source de Jeunesse	�34.00	�31.10	�2.90	Stable positive separation	Same-category premium comparison set
Regard Infini	�35.80	�32.40	�3.40	Stable positive separation	Same-category premium comparison set
Renaissance de Nuit	�42.70	�37.60	�5.10	Strong and consistently visible separation	Same-category premium comparison set

Interpretation

Two SKUs no longer maintain consistent premium separation. **L' clat d'Or** remains positioned close to the lower part of the competitive premium range, while **Voile Invisible SPF 50** sits too close to the lower competitor boundary to support a stable premium gap.

Three SKUs continue to operate within their intended positioning. **Source de Jeunesse**, **Regard Infini**, and **Renaissance de Nuit** remain positioned in the upper portion of the observed competitor range, indicating that premium separation remains structurally intact.

What the signal indicates

The observed positioning pressure is concentrated on a limited number of SKUs and does not reflect a portfolio-wide breakdown. The issue is not absolute price level alone, but where Maison H b  now sits within the observed competitor range.

Why it matters

Premium positioning depends on maintaining visible separation from relevant alternatives. When the Maison H b  observed price moves too close to the lower end of the competitor range, the product becomes easier to compare on price and harder to sustain as a premium choice.

Management implication

Priority should be placed on restoring clearer competitive separation for **L' clat d'Or** and **Voile Invisible SPF 50**. The remaining SKUs should be preserved in their current state, as they continue to support the intended premium architecture.

Competitive Price Trend and Direction

Relative price position weakened on two SKUs during the month, while remaining stable across the rest of the portfolio.

Price Trend — Month-over-Month View

SKU	Closest Competitor Reference	Maison Héb� MoM Change	Closest Competitor MoM Change	Relative Position Outcome	Signal Classification
L'�clat d'Or	Competitor A	-6.3%	-1.8%	Gap narrowed materially	Weakening
Voile Invisible SPF 50	Competitor B	-3.8%	+1.3%	Position weakened further	Weakening
Source de Jeunesse	Competitor C	-0.6%	-0.4%	Position maintained	Neutral
Renaissance de Nuit	Competitor D	+0.4%	+0.7%	Position maintained	Neutral
Regard Infini	Competitor E	-0.5%	-0.3%	Position maintained	Neutral

4-Week Trend Support

This table shows the start-to-end pricing path for Maison H b  and the closest observed competitor reference across the monthly observation window. It is designed to show whether the month-end outcome reflects steady erosion, limited movement, or stable relative positioning.

SKU	Maison H�b� W1 → W4	Closest Competitor Reference W1 → W4	4-Week Read
L'�clat d'Or	�31.50 → �29.50	�29.50 → �29.00	Maison H�b� declined steadily while the closest competitor remained broadly stable, narrowing the premium gap across the month
Voile Invisible SPF 50	�24.00 → �23.10	�23.40 → �23.70	Maison H�b� weakened while the closest competitor moved slightly upward, further weakening relative position by month-end
Source de Jeunesse	�34.20 → �34.00	�31.20 → �31.10	Relative position remained stable across the month
Renaissance de Nuit	�42.50 → �42.70	�37.40 → �37.60	Relative position remained stable across the month
Regard Infini	�36.00 → �35.80	�32.50 → �32.40	Relative position remained stable across the month

Interpretation

Two SKUs experienced sustained weakening in relative price position during the month. **L'Éclat d'Or** showed a steady month-long decline that materially narrowed the premium gap versus the closest observed competitor reference. **Voile Invisible SPF 50** weakened further as Maison Hébé pricing declined while the relevant competitor reference moved slightly upward, worsening the SKU's relative position by month-end.

The remaining SKUs maintained stable relative positioning. Month-over-month movement remained limited and did not materially alter competitive distance, indicating that relative price pressure remains concentrated rather than systemic.

What the signal indicates	Why it matters	Management implication
Month-over-month price movement is reinforcing competitive outcomes. Where Maison Hébé pricing declines faster than the closest observed competitor reference, relative positioning weakens over the course of the month.	Relative direction determines whether competitive pressure compounds or stabilizes. A weakening month-over-month position increases the likelihood of sustained positioning erosion even where absolute price levels do not appear materially abnormal in isolation.	Priority should be placed on stabilizing month-over-month relative movement for L'Éclat d'Or and Voile Invisible SPF 50 against the closest observed competitor reference. Monitoring should focus on both the month-end result and the 4-week start-to-end path to determine whether the relative gap is narrowing gradually or deteriorating more materially.

Visibility Position Review

Lower price visibility dominates two SKUs, while the remaining portfolio maintains strong premium visibility control.

Visibility Split by SKU

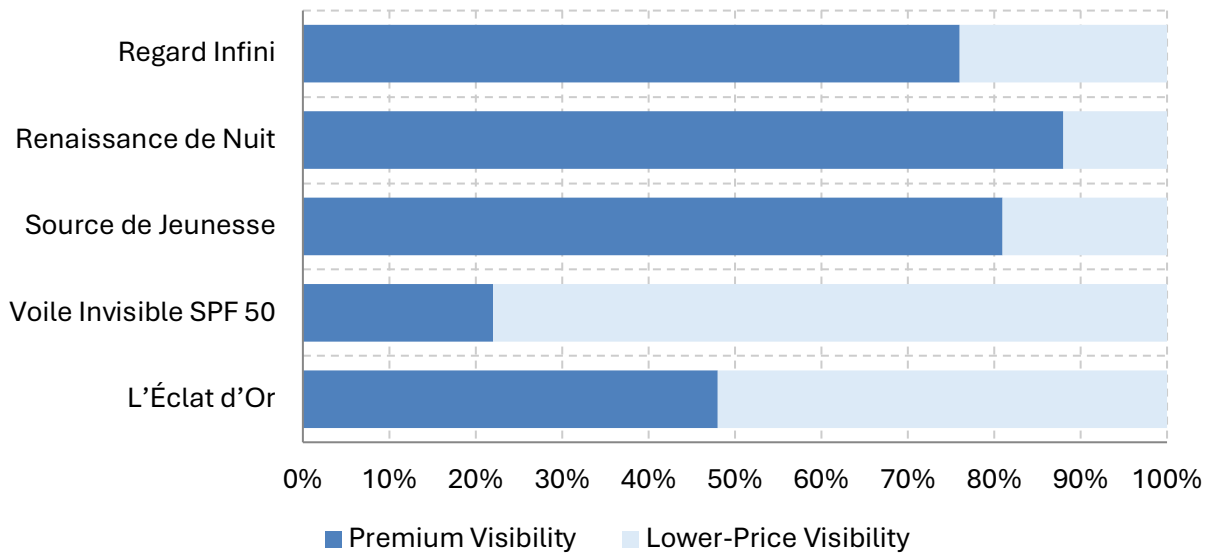
SKU	Dominant Visible Price State	Premium Visibility Share	Visibility Stability	Signal Classification
L'Éclat d'Or	Mixed, with frequent lower-price visibility	Moderate	Persistent	At risk
Voile Invisible SPF 50	Lower-price visible most often	Low	Persistent	Broken
Source de Jeunesse	Premium visible most often	High	Stable	Maintained
Renaissance de Nuit	Premium-led visible state	High	Stable	Fully Maintained
Regard Infini	Premium visible most often	High	Stable	Maintained

Observed Visibility Support

This table shows how often Maison Héb  was observed in a premium visible price state versus a lower visible price state during the observation window, together with the closest competitor visibility read.

SKU	Dominant Maison H�b� Visible Price State	Premium Visibility Share	Lower-Price Visibility Share	Closest Competitor Dominant Visible State	Visibility Read
L'�clat d'Or	Mixed, with frequent lower-price visibility	48%	52%	Lower-price visible more often	Lower-price visibility is frequent enough to influence shopper price reference
Voile Invisible SPF 50	Lower-price visible most often	22%	78%	Lower-price visible most often	Lower-price visibility now defines the main shopper-facing price state
Source de Jeunesse	Premium visible most often	81%	19%	Premium visible most often	Premium visibility remains intact
Renaissance de Nuit	Premium-led visible state	88%	12%	Premium visible most often	Premium visibility remains strongly controlled
Regard Infini	Premium visible most often	76%	24%	Premium-led visible state	Premium visibility remains stable

Visibility Split by SKU



Interpretation

Two SKUs show a meaningful visibility shift toward lower price states. **L'Éclat d'Or** displays recurring lower-price exposure often enough to weaken premium visibility control, while **Voile Invisible SPF 50** is now encountered most often at lower visible price points. These conditions make the lower visible price more likely to shape shopper perception than the intended premium state.

The remaining SKUs maintain stable premium visibility. **Source de Jeunesse**, **Renaissance de Nuit**, and **Regard Infini** continue to be encountered most often at premium visible price points, indicating that visibility pressure remains concentrated rather than systemic.

What the signal indicates

Market perception is being shaped by the most frequently visible price state rather than the full range of observed prices. For **L'Éclat d'Or** and **Voile Invisible SPF 50**, lower-price states are sufficiently visible to influence the perceived reference price.

Why it matters

Consumers anchor their expectations on the price they most frequently encounter. When lower visible price states recur often enough, they begin to redefine the effective market reference even when higher price points remain available elsewhere.

Management implication

Priority should be placed on reducing the visibility of lower price states for **L'Éclat d'Or** and **Voile Invisible SPF 50**. Monitoring should focus on the dominant visible price state and the share of premium versus lower-price visibility, rather than on the simple presence of multiple price points alone.

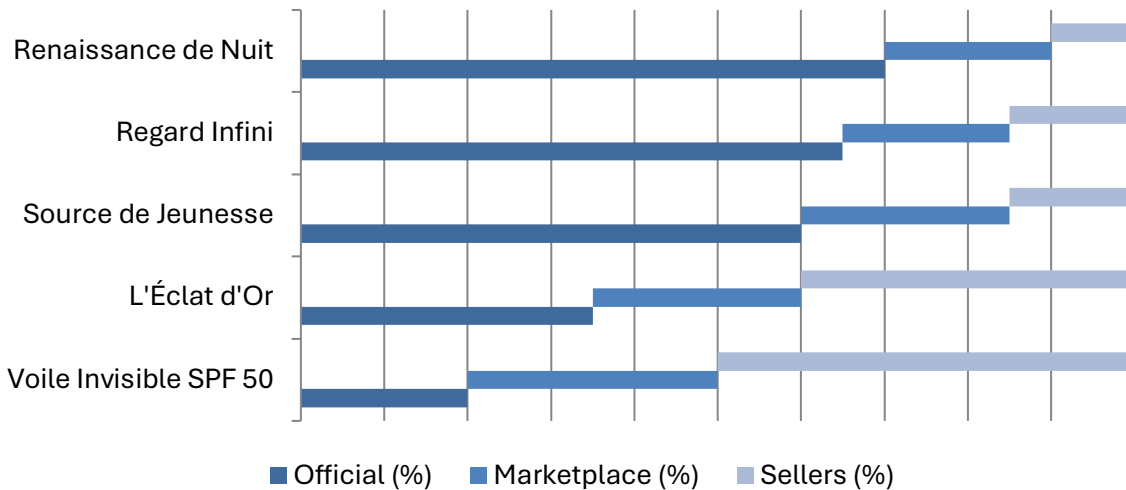
Visible Offer Source Mix (Source Structure)

Non-official sources dominate visibility for two SKUs, while the remaining portfolio retains strong official channel control.

Source Structure — SKU Assessment

SKU	Dominant Visibility Source	Official Share	Marketplace Share	Seller Share	Source Stability	Signal Classification
L'Éclat d'Or	Mixed, with elevated seller share	Moderate	Moderate	Elevated	Persistent	At risk
Voile Invisible SPF 50	Seller-led	Low	Moderate	High	Persistent	Broken
Source de Jeunesse	Official-led	High	Moderate	Low	Stable	Maintained
Renaissance de Nuit	Official-led	High	Low	Low	Stable	Fully Maintained
Regard Infini	Official-led	High	Low	Low	Stable	Maintained

Visibility Share by Source (Official vs Marketplace vs Sellers)



Observed Source Mix Support

This table shows the observed visibility composition for Maison Hébé by source type during the monthly observation window. It is designed to show whether visible pricing remains official-led or has shifted toward marketplace-led and seller-driven exposure.

SKU	Official Share	Marketplace Share	Seller Share	Source Pattern	Source Mix Read
L'Éclat d'Or	38%	29%	33%	Mixed, with elevated seller presence	Source control is no longer clearly official-led, increasing exposure to less controlled visible price states
Voile Invisible SPF 50	18%	27%	55%	Seller-led	Seller-driven visibility now defines the observed offer mix and weakens official price control
Source de Jeunesse	68%	22%	10%	Official-led	Official visibility remains dominant and continues to anchor visible price control
Renaissance de Nuit	79%	13%	8%	Strongly official-led	Official visibility remains strongly dominant with limited non-official interference
Regard Infini	72%	17%	11%	Official-led	Official visibility remains dominant and source structure remains stable

Interpretation

Two SKUs are structurally influenced by non-official sources. **L'Éclat d'Or** shows a mixed visibility composition with elevated seller presence, while **Voile Invisible SPF 50** is now seller-led. In both cases, official-channel control is no longer strong enough to anchor visible pricing consistently.

The remaining SKUs maintain strong official-channel dominance. **Source de Jeunesse**, **Renaissance de Nuit**, and **Regard Infini** continue to retain a high share of official listings, with limited seller-driven exposure, indicating that source-related pricing pressure remains concentrated rather than systemic.

What the signal indicates	Why it matters	Management implication
Visibility composition is directly shaping pricing outcomes. Where official share weakens and marketplace or seller-driven share rises, lower and less controlled visible price states are more likely to appear and persist.	Each source type exerts a different influence on observed pricing behavior. Official channels preserve pricing discipline, marketplace environments introduce broader competitive dynamics, and seller-driven visibility increases dispersion and weakens control over the shopper-facing reference price.	Priority should be placed on rebalancing visible source mix toward official channels for L'Éclat d'Or and Voile Invisible SPF 50 . Monitoring should focus on the relative shares of official, marketplace, and seller-driven visibility, as shifts in source composition act as early indicators of future pricing pressure and visibility-driven positioning risk.

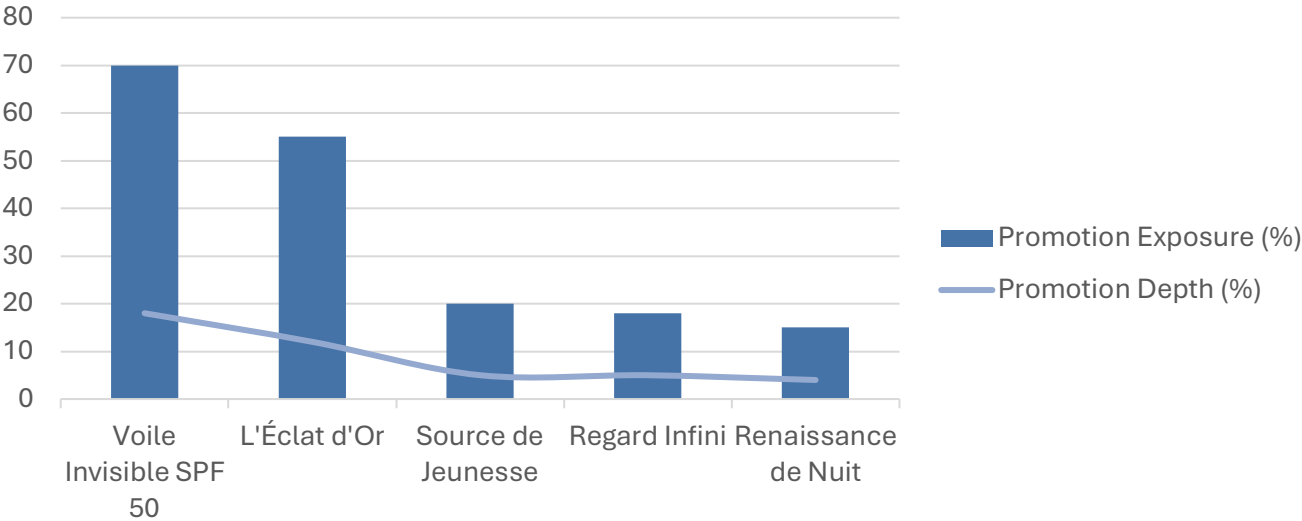
Promotion Environment

Promotional activity is concentrated on two SKUs and reinforces existing pricing pressure, while remaining contained across the rest of the portfolio.

Promotion Exposure — SKU Assessment

SKU	Promotion Exposure Rate	Promotion Depth	Promotion Stability	Signal Classification
L'Éclat d'Or	Elevated	Moderate	Persistent	Amplifying
Voile Invisible SPF 50	High	High	Persistent	Structural Pressure
Source de Jeunesse	Low	Low	Stable	Contained
Renaissance de Nuit	Low	Low	Stable	Contained
Regard Infini	Low	Low	Stable	Contained

Promotion Exposure and Promotion Depth by SKU



Observed Promotion Support

This table shows the observed frequency and depth of visible promotional activity during the monthly observation window. It is designed to show whether promotion remained occasional and contained, or whether repeated campaign-led visibility became strong enough to influence the visible market price state.

SKU	Promotion Exposure Rate	Typical Promotion Depth	Dominant Promotion Pattern	4-Week Promotion Read
L'Éclat d'Or	42%	14%	Repeated moderate promotion	Campaign-led promotional visibility remained frequent enough to reinforce existing price pressure across the month
Voile Invisible SPF 50	68%	22%	Repeated deep promotion	Promotional activity was both frequent and deep enough to materially weaken visible price control
Source de Jeunesse	9%	5%	Occasional shallow promotion	Promotion remained limited and did not materially alter visible price position
Renaissance de Nuit	6%	4%	Occasional shallow promotion	Promotion remained contained and did not contribute meaningfully to pricing pressure
Regard Infini	11%	6%	Limited moderate promotion	Promotional activity remained low enough to avoid material pricing impact

Interpretation

Promotional activity is concentrated on the same SKUs already under broader structural pressure. **L'Éclat d'Or** shows repeated moderate promotion frequent enough to amplify price weakening, while **Voile Invisible SPF 50** combines high exposure with deeper promotional activity, making visible promotion a more material driver of price deterioration.

The remaining SKUs exhibit limited promotional activity. **Source de Jeunesse**, **Renaissance de Nuit**, and **Regard Infini** show low exposure and shallow promotion depth, indicating that promotion-led visibility is not materially contributing to broader portfolio pressure.

What the signal indicates

Promotion reflects visible campaign or event-driven price activity rather than structural price compression alone. Where promotional exposure is frequent and sustained, campaign-led activity contributes to the normalization of lower visible price states.

Why it matters

Repeated promotional visibility changes shopper price expectations. When promotions are both frequent and visible, discounted campaign prices become more likely to shape the effective market reference rather than remain temporary deviations.

Management implication

Priority should be placed on reducing both the frequency and visible prominence of promotions on **L'Éclat d'Or** and **Voile Invisible SPF 50**. Monitoring should focus on sustained promotional exposure and typical promotion depth, while treating structural discount compression separately in the following section.

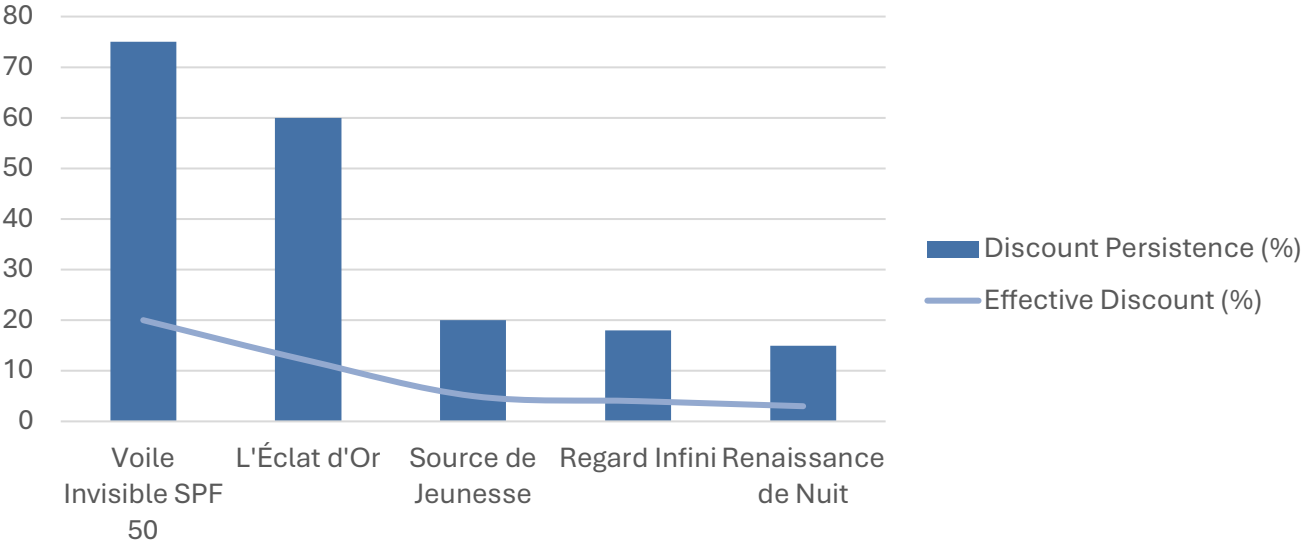
Discount Pressure

Discounting is structurally elevated on two SKUs, reinforcing price compression, while remaining controlled across the rest of the portfolio. Unlike promotional activity, which may be campaign-led or temporary, discount pressure reflects embedded observed price compression that remains visible often enough to influence the effective market price.

Discount Pressure — SKU Assessment

SKU	Effective Discount Rate	Discount Persistence Rate	Discount Stability	Signal Classification
L'Éclat d'Or	Moderate	Elevated	Persistent	Structural Pressure
Voile Invisible SPF 50	High	High	Persistent	Structural Pressure
Source de Jeunesse	Low	Low	Stable	Maintained
Renaissance de Nuit	Low	Low	Stable	Maintained
Regard Infini	Low	Low	Stable	Maintained

Discount Depth and Persistence by SKU



Observed Discount Support

This table shows the observed realized discount level and the frequency with which discounted pricing remained visible during the monthly observation window. It is designed to show whether discounting remained occasional, or whether it became persistent enough to shape the effective market price.

SKU	Effective Discount Rate	Discount Persistence Rate	Dominant Discount Pattern	4-Week Discount Read
L'Éclat d'Or	13%	46%	Repeated moderate discounting	Discounting remained visible often enough to compress the premium gap through the month
Voile Invisible SPF 50	21%	71%	Repeated deep discounting	Discounting was both deep and persistent enough to create ongoing structural price compression
Source de Jeunesse	4%	12%	Occasional shallow discounting	Discounting remained limited and did not materially alter visible price position
Renaissance de Nuit	3%	9%	Occasional shallow discounting	Discounting remained contained and did not contribute meaningfully to pricing pressure
Regard Infini	5%	14%	Limited moderate discounting	Discounting remained low enough to avoid material compression of visible price position

Interpretation

Two SKUs exhibit sustained discount pressure. **L'Éclat d'Or** shows moderate but persistent discounting frequent enough to narrow visible price separation, while **Voile Invisible SPF 50** combines deeper discount levels with high persistence, indicating ongoing structural compression rather than isolated discount events. Unlike the prior section, which focuses on visible promotional activity, this section reflects whether lower realized price levels have become embedded in the observed market structure.

The remaining SKUs maintain low discount levels with limited persistence. **Source de Jeunesse**, **Renaissance de Nuit**, and **Regard Infini** continue to show controlled discount behavior, indicating that discounting is not materially contributing to broader portfolio pressure.

What the signal indicates	Why it matters	Management implication
Discounting is no longer episodic for the affected SKUs and is instead embedded in the observed pricing structure. Persistent discount presence increases the likelihood that lower price levels become the effective baseline.	Sustained discounting compresses perceived value and reduces the ability to maintain premium price positioning. Unlike campaign-led promotions, structural discounting directly resets market price expectations and weakens pricing recovery potential.	Priority should be placed on reducing both the depth and persistence of discounting on L'Éclat d'Or and Voile Invisible SPF 50 . Monitoring should focus on sustained discount presence and realized discount depth, rather than isolated promotional visibility alone.

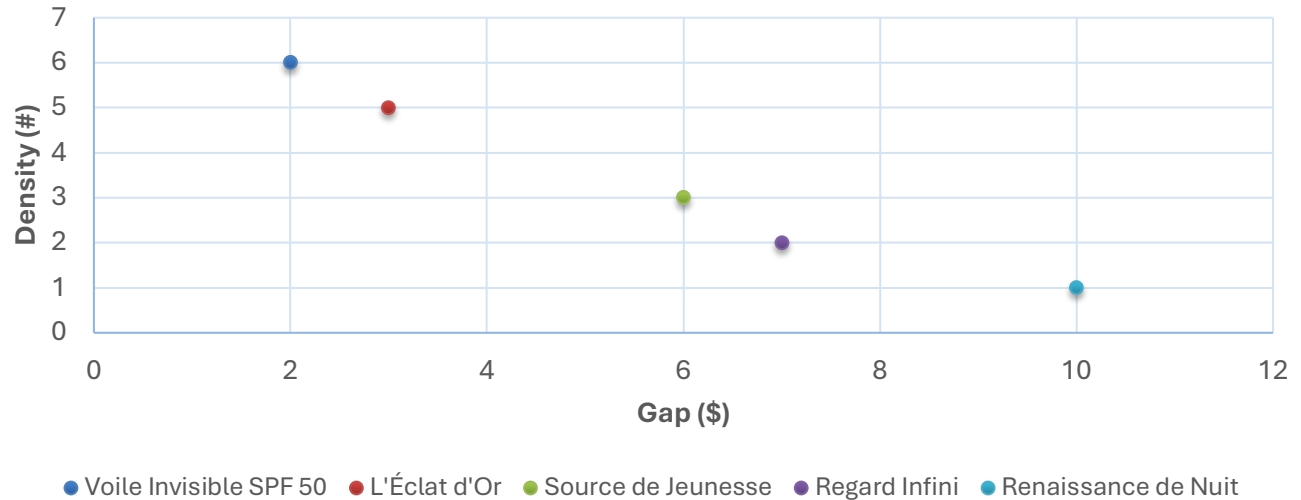
Value Ladder and Substitution Pressure

Substitution pressure is elevated on two SKUs due to narrow price gaps and dense competitive alternatives, while remaining limited across the rest of the portfolio.

Substitution Pressure — SKU Assessment

SKU	Substitution Gap	Substitution Density	Ladder Position Stability	Signal Classification
L'Éclat d'Or	Narrow	High	Eroding	At risk
Voile Invisible SPF 50	Narrow	High	Eroding	Structural Pressure
Source de Jeunesse	Moderate	Moderate	Stable	Maintained
Renaissance de Nuit	Wide	Low	Stable	Fully Maintained
Regard Infini	Moderate	Low	Stable	Maintained

Substitution Gap vs Competitive Density by SKU



Observed Substitution Support

This table shows the observed price distance to the closest relevant alternative together with the number of visible substitutes within the accessible comparison range. It is designed to show whether competitive pressure remains limited or whether the product is now exposed to dense price-based comparison.

SKU	Closest Competitor Gap	Visible Substitute Count	Dominant Competitive Read	Substitution Read
L'Éclat d'Or	€0.50	6	Narrow gap with dense alternatives	Competitive proximity is now high enough to increase substitution risk materially
Voile Invisible SPF 50	-€0.20	7	Overlapping with dense alternatives	Product now sits inside a crowded comparison range, making substitution pressure structural
Source de Jeunesse	€3.00	3	Moderate separation with manageable density	Competitive pressure remains contained
Renaissance de Nuit	€5.10	1	Wide separation with limited alternatives	Substitution risk remains low
Regard Infini	€2.80	2	Moderate separation with low density	Competitive pressure remains limited

Closest Relevant Alternatives

SKU	Closest Relevant Alternatives	Competitive Context
L'Éclat d'Or	Competitor A, Competitor B, Competitor C	Multiple visible alternatives sit close enough in price to weaken premium separation
Voile Invisible SPF 50	Competitor D, Competitor E, Competitor F	SKU now overlaps with several nearby alternatives inside the same shopper comparison band
Source de Jeunesse	Competitor G, Competitor H	Alternatives remain visible but sufficiently separated
Renaissance de Nuit	Competitor I	Limited substitute pressure due to strong price separation
Regard Infini	Competitor J, Competitor K	Alternatives remain present but not close enough to drive structural substitution pressure

Interpretation

Two SKUs are exposed to elevated substitution pressure. **L'Éclat d'Or** and **Voile Invisible SPF 50** both sit within narrow competitive price distance while also facing a dense set of visible alternatives. This combination increases the likelihood that the shopper compares them primarily on price rather than on brand-led differentiation.

The remaining SKUs maintain sufficient separation within the value ladder. **Source de Jeunesse**, **Renaissance de Nuit**, and **Regard Infini** retain wider competitive distance and lower alternative density, reducing the likelihood of substitution-driven pressure.

What the signal indicates	Why it matters	Management implication
Competitive pressure is being driven by proximity to substitute products rather than by internal pricing actions alone. Where price gaps narrow and visible alternatives increase, substitution risk rises regardless of intended brand positioning.	When multiple alternatives exist within a narrow accessible price range, shopper decision-making shifts from preference-led choice toward direct price-based comparison. That reduces pricing power and increases sensitivity to small changes in visible separation.	Priority should be placed on restoring clearer price separation within the value ladder for L'Éclat d'Or and Voile Invisible SPF 50. Monitoring should focus on both closest competitor gap and visible substitute count, as these two factors jointly determine substitution pressure.

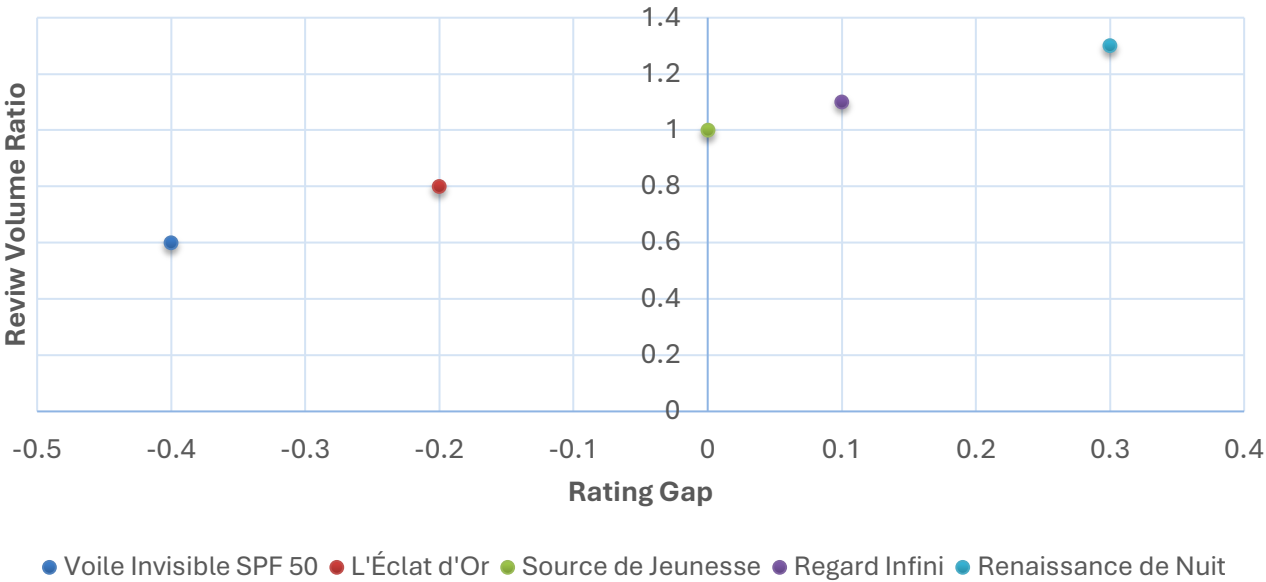
Review and Rating Pressure

Perception pressure is elevated on two SKUs due to weaker relative ratings and lower review visibility, while the remaining portfolio maintains stronger credibility positioning.

Review and Rating — SKU Assessment

SKU	Rating Gap	Review Volume Ratio	Perception Stability	Signal Classification
L'Éclat d'Or	Slightly negative	Moderate	Eroding	At risk
Voile Invisible SPF 50	Negative	Low	Eroding	Structural Pressure
Source de Jeunesse	Neutral	Moderate	Stable	Maintained
Renaissance de Nuit	Positive	High	Stable	Fully Maintained
Regard Infini	Neutral	Moderate	Stable	Maintained

Rating Gap vs Review Volume Ratio by SKU



Observed Perception Support

This table shows the observed rating difference versus the closest relevant competitor reference together with relative review visibility. It is designed to show whether credibility remains supportive, neutral, or increasingly weak relative to competing alternatives.

SKU	Maison Héb� Rating	Closest Competitor Rating	Rating Gap	Review Volume Ratio	Perception Read
L'�clat d'Or	4.1	4.3	-0.2	0.72x	Slight rating disadvantage with only moderate review support
Voile Invisible SPF 50	3.9	4.3	-0.4	0.48x	Weaker rating and materially lower review visibility than the closest competitor
Source de Jeunesse	4.2	4.2	0.0	0.94x	Neutral credibility position with sufficient review support
Renaissance de Nuit	4.5	4.2	+0.3	1.28x	Stronger credibility position than the closest competitor
Regard Infini	4.2	4.2	0.0	0.89x	Stable credibility position with no material disadvantage

Closest Relevant Competitor Reference

SKU	Closest Relevant Competitor Reference	Credibility Context
L'�clat d'Or	Competitor A	Slightly higher rating with stronger review visibility
Voile Invisible SPF 50	Competitor B	Higher rating and materially stronger review base
Source de Jeunesse	Competitor C	Similar rating and broadly comparable review visibility
Renaissance de Nuit	Competitor D	Maison H�b� remains stronger on both rating and review depth
Regard Infini	Competitor E	Similar rating with no material credibility disadvantage

Interpretation

Two SKUs exhibit elevated perception pressure. **L' clat d'Or** shows a modest but meaningful rating disadvantage relative to the closest competitor reference, while review visibility remains only moderate. **Voile Invisible SPF 50** shows a clearer negative rating gap combined with weaker review volume, creating a structurally weaker credibility position.

The remaining SKUs maintain stable or stronger perception metrics. **Source de Jeunesse**, **Renaissance de Nuit**, and **Regard Infini** continue to hold neutral to positive relative credibility positions, indicating that perception-based pressure remains concentrated rather than systemic.

What the signal indicates	Why it matters	Management implication
Perception-based pressure is emerging on the same SKUs already exposed to pricing and substitution pressure. Where ratings are weaker and review visibility is lower, perceived product value declines relative to alternatives.	Consumers use ratings and reviews as a primary credibility filter. When perceived quality falls below the most relevant alternatives, price becomes harder to defend, and substitution risk rises more quickly.	Priority should be placed on improving both rating position and review visibility for L'Éclat d'Or and Voile Invisible SPF 50 . Monitoring should focus on relative credibility position versus the closest observed competitor reference, rather than on absolute scores alone.

Signal Synthesis

Portfolio-Level Diagnosis

Price pressure within Maison Hébé remains concentrated on a limited number of SKUs but is now driven by reinforcing interactions across multiple signal layers rather than isolated factors.

Signal Interaction

Where visibility is controlled by non-official sources, pricing behavior shifts from controlled to competitive. Seller-driven listings increase exposure to lower price points and introduce price dispersion. This is reinforced by sustained promotional and discount activity, which increases the frequency and visibility of these lower price states.

As a result, the effective market reference price shifts downward, compressing the perceived premium gap and increasing substitution risk. Over time, this dynamic is further reinforced by perception signals, as weaker relative ratings and lower review visibility reduce the ability to sustain pricing differentiation.

SKU Concentration

The observed pressure remains concentrated on L'Éclat d'Or and Voile Invisible SPF 50, while the remaining SKUs maintain structural stability across all signal layers. This indicates that the current state reflects localized structural exposure rather than systemic breakdown.

However, the presence of the same reinforcing signal pattern across multiple dimensions suggests that, if left unmanaged, these dynamics could extend beyond the currently affected SKUs.

System Stability

The portfolio remains structurally stable at an aggregate level, with three SKUs maintaining consistent positioning, visibility control, and limited exposure to discount and substitution pressure. These SKUs continue to support the intended premium architecture.













The overall system should therefore be characterized as stable but exposed, with localized structural weaknesses that require targeted intervention to prevent broader normalization effects.

Forward Risk Trajectory

If current dynamics persist, the primary risk is not further price decline but the stabilization of lower price levels as the effective market reference. This would reduce the ability to restore premium positioning without structural intervention.

The trajectory of risk is therefore dependent on the persistence of seller-driven visibility, the duration of discount exposure, and the evolution of substitution density within accessible price ranges.

Appendix A - SKU Signal Heatmap

SKU	Positioning	Trend	Visibility	Source	Promotion	Discount	Substitution	Review
L'Éclat d'Or								
Voile Invisible SPF 50								
Source de Jeunesse								
Renaissance de Nuit								
Regard Infini								

Maintained: Green, At Risk: Yellow, Structural Pressure / Broken: Red

Appendix B - Month-over-Month Signal Evolution

Section	Nov	Dec	Jan	Feb	Mar	Apr
Price Positioning						
Price Trend						
Visibility						
Source Mix						
Promotion						
Discount						
Substitution						
Review & Rating						

Maintained: Green, At Risk: Yellow, Structural Pressure / Broken: Red

Appendix C - Section Reference (Navigation Layer)

This appendix is a navigation layer for the recurring Market Pressure Review. It clarifies what each section is designed to assess, what the core concept is, which metric or evidence point matters most, and what role each signal plays in the wider pressure model. It is intended to make the report easier to read, forward, and use without turning the main body into a methodology note.

Signal Type Guide

Signal Type	Meaning
Structural	Underlying competitive or control condition shaping market position
Directional	Change over time showing whether pressure is strengthening or stabilizing
Perception	What the shopper most frequently sees in the market
Trigger	Event-driven activity that can amplify existing pressure
Structural Outcome	Embedded pricing condition that affects the effective market reference
External	Pressure created by the surrounding competitor set
Credibility	Non-price signal affecting perceived product quality and substitutability

Section Reference

Section	Objective	Core Concept	Key Metric / Evidence Point	Signal Type
Competitive Price Positioning	Show where Maison Héb� sits relative to the closest relevant competitors	Premium position depends on maintaining visible separation from relevant alternatives	Price gap versus closest observed competitor	Structural
Competitive Price Trend and Direction	Show whether relative position is improving, holding, or weakening over time	Relative movement determines whether competitive pressure is compounding or stabilizing	Maison H�b� MoM change versus closest observed competitor MoM change	Directional
Visibility Position Review	Show which visible price state the shopper most frequently encounters	The dominant visible price state shapes the effective market reference more than the full observed range	Premium visibility share versus lower-price visibility share	Perception
Visible Offer Source Mix (Source Structure)	Show who is controlling visible price presentation in the market	Official, marketplace, and seller-driven visibility do not exert the same pricing pressure	Official share, marketplace share, seller share	Structural

Section	Objective	Core Concept	Key Metric / Evidence Point	Signal Type
Promotion Environment	Show whether campaign-led promotional activity is frequent enough to shape price perception	Repeated promotional visibility can amplify existing weakness even when it begins as event-led activity	Promotion exposure rate and typical promotion depth	Trigger
Discount Pressure	Show whether lower realized price levels have become persistent enough to compress premium positioning	Sustained discounting resets the effective market reference more directly than occasional promotion	Effective discount rate and discount persistence rate	Structural Outcome
Value Ladder and Substitution Pressure	Show whether narrow competitive distance and dense alternatives are increasing switching risk	Substitution pressure rises when comparable alternatives are both close in price and easy to access	Closest competitor gap and visible substitute count	External
Review and Rating Pressure	Show whether weaker credibility signals are increasing competitive vulnerability	Ratings and reviews can reinforce or weaken pricing power by shaping perceived product value	Rating gap and review volume ratio	Credibility

How to read the report

The section order is intentional. The report moves from:

1. current competitive position
2. change over time
3. which price state the shopper most frequently sees
4. who is controlling visible price presentation
5. short-term amplifiers
6. embedded pricing outcomes
7. substitute pressure from the competitor set
8. credibility pressure from ratings and reviews

This sequence is designed to move from core price position into the mechanisms that reinforce or weaken it.

Interpretation boundary

No single section should be read in isolation. The product is designed to show where multiple external signals reinforce one another strongly enough to create structural market pressure, and where those same signals remain contained.

Reading logic

The report should be read as a pressure model rather than a set of isolated observations.

- Positioning shows where the SKU currently sits.
- Trend shows whether that position is strengthening or weakening.
- Visibility shows which price state the shopper most frequently sees.
- Source Mix shows who is controlling that visible state.
- Promotion shows whether campaign-led activity is amplifying pressure.
- Discount shows whether lower price levels are becoming embedded.
- Substitution shows whether competitive alternatives are close enough to increase switching risk.
- Review & Rating shows whether credibility is reinforcing or weakening the SKU's defensibility.

Appendix D – Glossary

Competitive Price Positioning

Closest Observed Competitor Reference	The most relevant directly comparable competitor used as the primary reference point for observed price and trend comparison.
Observed Competitive Price Range	The visible spread between the lowest and highest relevant competitor prices for a monitored SKU during the observation window.
Competitive Price Gap	Difference between the brand’s observed price and the closest observed competitor reference.
Premium Tier	Price band representing products positioned above the market median within a category.
Tier Integrity	Degree to which a product maintains consistent separation from lower pricing tiers.

Competitive Price Trend

Direction	Classification of price movement as upward, downward, or stable.
Relative Position Outcome	The observed result of Maison Héb� price movement versus the closest observed competitor reference over the reporting period.
Month-over-Month Change	Observed percentage change in Maison H�b� price or competitor reference price across the monthly reporting window.
4-Week Trend Support	Start-to-end pricing path used to show whether the monthly outcome reflects steady erosion, limited movement, or stable relative positioning.

Visibility Position

Premium Visibility Share	Proportion of observations in which the product is visibly presented in a premium visible price state.
Dominant Visible Price State	The visible price state most frequently encountered by the shopper during the observation window.
Lower-Price Visibility Share	Proportion of observations in which the product is visibly presented in a lower-price state rather than a premium visible price state.
Visibility Stability	Consistency of visible price positioning.

Source Structure (Source Mix)

Official Share	Share of visible observations controlled by official channels.
Marketplace Share	Share of visible observations controlled by marketplace environments.
Seller Share	Share of visible observations controlled by independent/3rd-party sellers.
Source Stability	Consistency of source composition over time.
Dominant Visibility Source	The source type most frequently controlling visible price presentation.

Promotion Environment

Promotion Exposure Rate	Share of visible observations displaying promotional pricing.
Promotion Depth	Magnitude of price reduction during promotions.
Promotion Stability	Persistence of promotional activity.
Dominant Promotion Pattern	The most common form of observed promotional activity, such as repeated moderate promotion or repeated deep promotion.

Discount Pressure

Effective Discount Rate	Average realized price reduction across visible observations.
Discount Persistence Rate	Frequency of discounted pricing over time.
Discount Stability	Consistency of discounting behavior.
Dominant Discount Pattern	The most common observed discount structure, such as repeated moderate discounting or repeated deep discounting.

Value Ladder and Substitution Pressure

Substitution Gap	Observed price distance between the brand and the closest relevant alternative.
Substitution Density	Number of comparable alternatives within a price range.
Ladder Position Stability	Consistency of the brand's position within the category price hierarchy.
Visible Substitute Count	Number of relevant alternatives that remain close enough in price to increase switching risk.

Review and Rating Pressure

Rating Gap	Difference between the brand's observed rating and that of the closest relevant competitor reference.
Review Volume Ratio	Relative review visibility of the brand versus the closest relevant competitor reference.
Perception Stability	Consistency of rating and review positioning.
Credibility Context	The relative strength or weakness of the brand's rating and review position versus the closest competitor reference.

Cross-Section Reading Terms

Observed Support Table	The section-level table used to show the specific observed data supporting the interpretation
Signal Classification	The summary classification assigned to a section signal, such as Maintained, At Risk, Weakening, Amplifying, Structural Pressure, or Broken.
Pressure Concentration	A pattern in which market pressure remains focused on a limited number of SKUs rather than across the full portfolio.
Structural Pressure	A repeated and reinforcing condition strong enough to weaken the intended premium position unless corrected.
Contained	A condition where the observed signal remains limited and is not materially contributing to broader portfolio pressure.
Fully Maintained	A condition where the intended premium structure remains strongly intact with no meaningful current pressure signal.
Maintained	A condition where the observed signal remains stable and does not currently weaken the intended market position.
At Risk	A condition where meaningful pressure is visible, but the structure is not yet fully broken.
Broken	A condition where the intended premium position or control state is no longer being maintained consistently.

Appendix E – Data Sources and Methodology

This report is based on publicly observable external market data collected across online retail environments where Maison Héb  products are visibly listed and sold during the monthly reporting window.

The analysis is designed to show how external market pressure is developing across price position, visibility, source control, promotion, discounting, substitution, and perception. It is based only on observable external signals and does not rely on internal brand data or non-public sources.

Scope of observation

Data is captured at the SKU level and includes:

- Observed Maison H b  prices across visible listings
- Closest observed competitor references within the relevant comparable set
- Visible competitor price relationships and competitor range positioning
- Dominant visible price state, including premium-visible and lower-price-visible exposure
- Visibility composition by source type, including official, marketplace, and seller-driven visibility
- Visible promotional activity, including promotion exposure rate and typical promotion depth
- Realized discount behavior, including effective discount rate and discount persistence
- Substitute density and competitive distance within accessible comparison ranges
- Customer ratings and review visibility relative to the closest relevant competitor reference

Observation logic

The report is based on recurring observation points collected within the reporting period. These observations are used to assess:

- Current competitive position
- Direction of movement across the monthly window
- Dominant shopper-facing price state
- Source composition of visible offers
- Whether promotional activity remained occasional or became frequent
- Whether discounting remained limited or became embedded
- Whether competitor proximity and substitute density increased switching pressure
- Whether perception signals remained supportive or became weaker relative to alternatives

Where trend is assessed, the report uses month-over-month comparison and start-to-end observation across the reporting window rather than isolated single-point observation.

Comparability

Comparability across Maison Hébé SKUs and competitor references is maintained through:

- Standardized product selection criteria
- Controlled comparable-set logic
- Consistent observation of visible market conditions
- Repeated use of the closest observed competitor reference where section logic requires direct relative comparison

This approach is intended to ensure that pressure signals reflect real competitive context rather than isolated or non-comparable observations.

Interpretation boundary

The report is intended to reflect how pricing, visibility, source control, promotion, discounting, substitution pressure, and credibility signals are presented to the end consumer in the market.

It is designed to identify where multiple observable external signals reinforce one another strongly enough to create market pressure, and where those same signals remain contained.

The report does not rely on internal commercial data, non-public channel information, or hidden marketplace records. It should therefore be read as an external market-pressure model built on visible public observation.