

A YEAR OF INNOVATION IN HAIRCARE, STYLING & COLOUR, 2022

Sustainability themes continue to drive innovation with opportunity for more inclusive and convenient innovation, and sensorial and playful textures and concepts.



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Report Content



- What we have seen
- Our pick of the most innovative launches in this review
- Innovation opportunities in haircare, styling & colour

EUROPE, MIDDLE EAST & AFRICA (EMEA)

- EMEA retail market overview: shampoo and conditioner, 2022
- EMEA retail market overview: hair colourants, 2022
- EMEA retail market overview: hair styling, 2022

Europe: boost NPD for different life stages and the underserved

- Extend personalised haircare to complement life stages
- Innovations focus on menopause and pregnancy
- Cater for all genders and hair textures, and be disability-inclusive
- Inclusive NPD for all genders, Afro hair and the visually impaired
- Appeal to a growing Muslim population

Europe: step up sustainability claims

- Sustainability has become an expectation
- Ethical/environmental claims continue to rise
 - Graph 1: share of haircare/styling/colour launches with select eco/ethical claims, 2017-18 vs 2021-22
- Raise the profile of underused sustainable claims
- Include an applicator-case for easier solid haircare routines

The Middle East & Africa (MEA)

- Fast-growing claims focus on naturalness, eco-friendliness and convenience
 - Graph 2: top five fastest growing claims in haircare, styling and colour overall, 2017-18 vs 2021-22
- Innovative products tap into natural and eco trends

ASIA PACIFIC (APAC)

- APAC retail market overview: shampoo and conditioner, 2022
- APAC retail market overview: hair colourants, 2022
- APAC retail market overview: hair styling, 2022

Asia: replicate the salon experience at home

- Create products that replicate the salon experience

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- Play with textures to emphasise convenience and enliven the senses
 - Graph 3: share of hair colourants, treatments and styling products, by select format/textures, 2021-22
- Stress convenience to compete with salons
 - Graph 4: share of hair colourants, hair treatments and hair styling, by select convenience claims, 2021-22
- At-home innovations promote convenience
- Combine the at-home salon experience with scalp care

Asia: broaden the appeal of anti-hairloss/hair growth products

- Anti-hairloss claims can better appeal to women
- Anti-hairloss claims are most active and rising in APAC
 - Graph 5: share of shampoo and hair treatment launches with anti-hairloss claims, APAC vs global average, 2017-22
- Drive more comprehensive anti-hairloss routines
- Elevate anti-hairloss NPD with science-led approaches

Australia & New Zealand: eco/ethical, 'free from' and natural claims are above average

- Top five claims focus on the eco/ethical, natural and 'free from'
 - Graph 6: top five haircare, styling and colour claims, compared to the global average, 2021-22
- Eco/ethical claims drive innovation

THE AMERICAS

- The Americas retail market overview: shampoo and conditioner, 2022
- The Americas retail market overview: hair colourants, 2022
- The Americas retail market overview: hair styling, 2022

North America: redress the decline in at-home hair colourants

- Maintain engagement with at-home hair colourants
- Reverse the decline in hair colourant launches
- Innovations offer guidance and promote ease-of-use and durability
- Be creative with applicators for easier at-home hair colouring
- Inject an element of playfulness into hair colourants

North America: skincare-inspired ingredients continue to move into haircare

- Blur haircare with skincare
- Skincare-inspired textures/formats are increasing in hair treatments
 - Graph 7: hair treatments with skincare-inspired formats/textures, 2017-22
- Serums and drops are trending
- Familiar skincare ingredients make inroads in haircare
- The Ordinary's ingredient-first and science-led approach moves to haircare
- Skincare-focused innovations appeals to bald men

Latin America: change the negative narrative around parabens

- Educate consumers on the safety and benefits of parabens
 - Graph 8: share of hair products with paraben-free claims, Latin America vs global average, 2017-18 vs 2021-22
- Lush stresses the safety of its parabens
- Paraben-free claims are called out front-of-pack
- Innovations embrace parabens

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