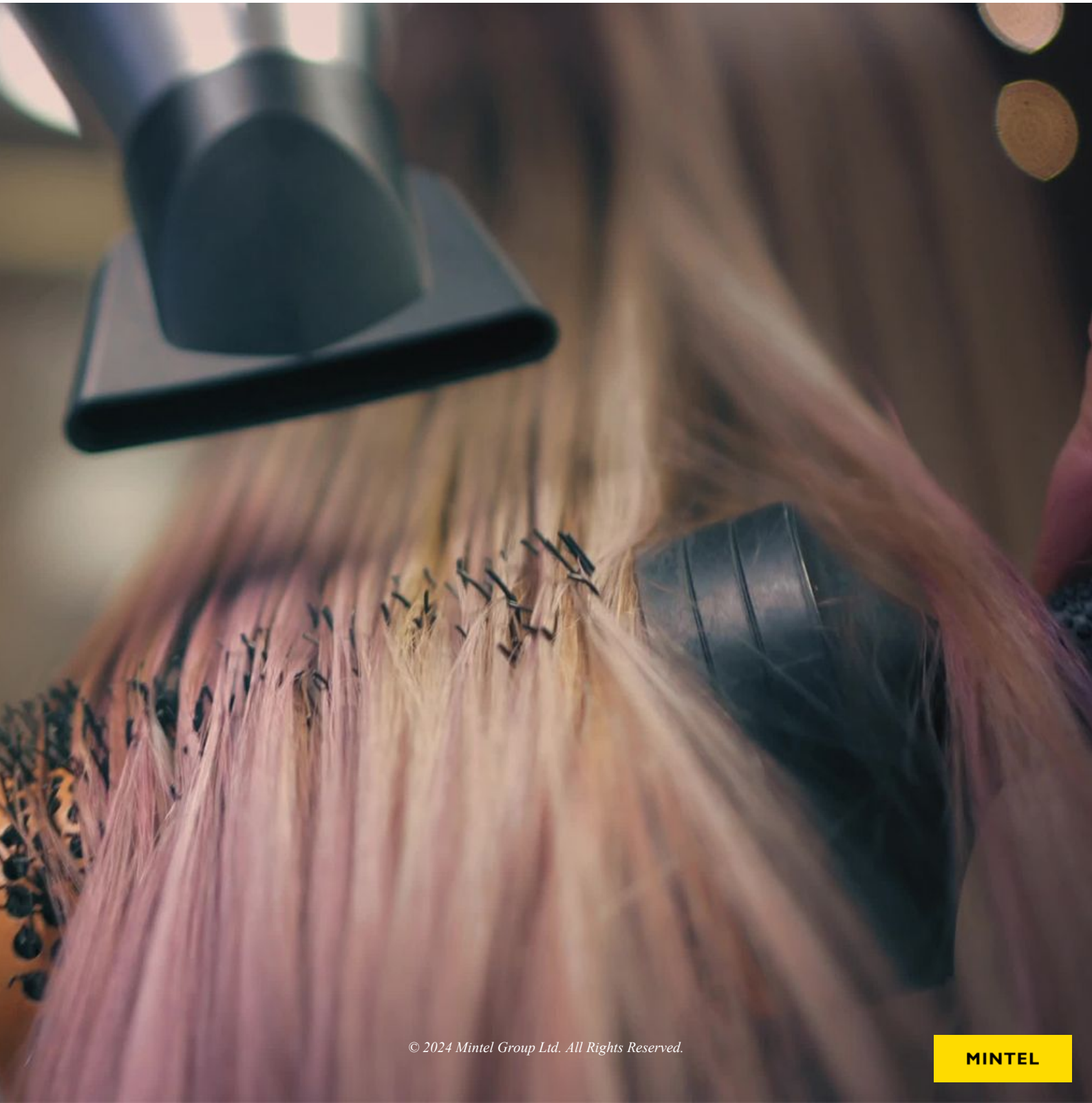


THE FUTURE OF HAIRCARE, STYLING & COLOUR: 2019

Global annual review: what's now and what's next for the haircare market.



Andrew McDougall,
Global Beauty & Personal
Care Analyst



Report Content

- What's in this report?
- Mintel's synopsis

IMMEDIATE FUTURE: NEXT 2 YEARS

1. My hair, my care

- Mintel recommends
- Customisation is a growing demand
- Customise without confusion
- Answer consumers' specific hair questions
- Ensure customers are using the right product for their hair
- Offer experimentation without commitment to express individuality
- Help consumers easily switch up their style or colour
- Glass hair, Living Coral, multi-tonal rainbow, and ultra violet trend
- Young consumers want fun, expressive hair colours
- Ringfence the risk by growing your own
- Build a connection with tailored solutions

Brazilian haircare: admired but not fully explored

- Mintel recommends
- Look to Brazil for hair inspiration, appeal and expertise
- Hair consumers won't compromise on performance, so raise the value proposition
 - Graph 1: retail sales of shampoos and conditioners, by value, 2012-22
- Recognise all the different hair types
- Recognise all different hair types
- Build a community around good hair practices
- An opportunity to provide more curly/Afro hair solutions
- Help those with wavy hair to go natural
- Inspire hair colour for curls
- Natural/ethical is important to Brazilians, but they WON'T compromise on performance
 - Graph 2: top 5 claims on hair product launches, 2017-18
- On-trend oils and natural extracts denote naturalness and nourishment
- Protection from the elements creates a space for night-time and hybrid products
- High interest in moisturising and repairing benefits presents opportunities
- Straightened and heat-styled hair needs a care focus

- Make packaging fun and eye-catching
- Make formats and packs attention-grabbing, calling on familiar crossovers
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3. Hair health by lifestage

- Mintel recommends
- Damage is still a concern and driving purchases
- Care claims resonate with damage-concerned consumers
- Damage concerns continue to drive the desire for natural products and ingredients
- Create a brand identity with clean label haircare
- From food to beauty: put more emphasis on the clean movement
- The clean label movement creates a sense of community
- Hair health needs a total wellbeing approach
- Science is on-side for scalp care
- Mindful haircare offers a holistic approach to relaxation
- Link nutrition and health to hair appearance
- Make a connection with body positivity to build a community
- Be more inclusive and highlight caring, healthy hair solutions
- Global 60+ population is growing faster than all other age groups
- New solutions to grey hair extend beyond the ageing message
- IFF-Lucas Meyer's anti-grey hair active
- Hair loss and fall continue to concern men and women
 - Graph 3: hair products launched with an anti-hair loss claim, 2016-18
- Look to India for Ayurvedic hair fall solutions like bhringraj oil

PLANNING AHEAD: NEXT FIVE YEARS

4. Focus on scalp care

- Mintel recommends
- Scalp health and care is high on the agenda
- Time to target scalp care as concerns rise
- Expand consumer understanding of scalp care
- Target men with scalp care beyond tackling dandruff
- Gain a foothold in men's haircare through scalp care positioning
- Segment and promote scalp care to provide the right solution
- Cross-category inspiration for scalp care
- Emphasise scalp benefits using skincare language
- Tout scalp-protecting benefits with a host of claims

- Pollution's impact on skin will drive scalp claims
- CBD – it could be good for the scalp
 - Graph 4: scalp care launches* containing Cannabis sativa seed oil, 2016-18
- There are strict rules on CBD, depending on region
- Use CBD but steer clear of health claims
- When CBD claims backfire
- Hair products with Cannabis sativa seed oil
- Treat dandruff and other scalp problems with probiotics
- Balancing the microbiome can help with hair loss
- Bring skincare's obsession with the microbiome to scalp care
- L'Oréal turns its attention to the scalp microbiome
- Diagnosis can increase understanding and build trust
- Customise products and recommendations for the individual

5. Zero-waste haircare

- Mintel recommends
- Listen to the 'wake-up call'
- Challenge rinse times to reduce waste
- L'Oréal invests in low-waste rinsing technology
- Make environmental commitments clear to get consumer buy-in
- Stick formats play in the zero-waste arena
- Aquatic toxicity needs biodegradable solutions
- Zero-waste packaging should be simple, easy-to use and appealing
- Haircare brands looking at zero-waste packaging initiatives
- Outside Europe, recycle-related claims stagnate or decline
 - Graph 5: hair product launches with on-pack recycling claims, by region, 2014-18
- Explain which parts are recyclable to win consumer loyalty
- Explain WHY and HOW to recycle products after use
- Global bio-plastics market expands with the demand for eco-friendly products
- Pulling bio-plastics out of thin air... literally
- Bio-based packaging technologies on the horizon
- Distribute products in a zero-waste environment
- Encourage sustainable behaviour once the product has left your premises
- Reducing waste in retail
- The 'milkman' for consumer goods could change distribution
- How the Loop system works

6. The power of the salon

- Mintel recommends

The Future of Haircare, Styling & Colour: 2019

- Sustainable professional products and salons have growing appeal
- Consumers value professional salon services
- Build a connection and evolve a true value experience
- Consumers have great trust in professional products and trade expertise
- Highlight expertise to build trust and add value
- Focus on hair health is driving professional hair product sales
- Damage-repairing hair products
- Make connections more personal and 'human'
- Image-based social media gives great insight into trending looks
- Use data to enhance the experience
- Add value and make bookings simpler
- Blockchain booking for hair appointments
- Use AR to customise hair appointments and visualise a desired look before application
- Make the salon a must-visit destination with in-salon, enhanced entertainment

MARKET OVERVIEW

- Find opportunities in Asia as efficacy drives demand
- Natural and ethical influence the market, as styling growth stalls

SHAMPOO, CONDITIONER & TREATMENTS

Market data

- China is a slow-moving giant, but innovation can encourage trading up
- Top 5 retail markets for shampoo & conditioner globally in 2019
- Top 5 retail markets for shampoo & conditioner globally in 2019
- Fastest- and slowest-growing shampoo & conditioner markets, last 5 years
- Fastest- and slowest-growing shampoo & conditioner markets, next 5 years
- Highest and lowest per capita spend

Claims

- Natural and ethical claims still growing in haircare
- Global: top claims over the last 5 years
 - Graph 6: [no title]

HAIR COLOUR

Market data

- India forecasts growth in at-home hair colour; US needs to breathe new life into women's colour

The Future of Haircare, Styling & Colour: 2019

- Top 5 global retail markets for hair colourants in 2019
- Fastest- and slowest-growing hair colourant markets, last 5 years
- Fastest- and slowest-growing hair colourant markets, next 5 years
- Highest and lowest per capita spend

Claims

- On-pack colour claims vary by region
- Global: top claims over the last 5 years
 - Graph 7: [no title]

HAIR STYLING

Market data

- Styling struggles amid damage concerns
- Top 5 retail markets for hair styling globally in 2019
- Fastest- and slowest-growing hair styling markets, last 5 years
- Fastest- and slowest-growing hair styling markets, next 5 years
- Highest and lowest per capita spend

Claims

- Men's growth to continue on-pack in hair styling
- Global: top claims over the last 5 years
 - Graph 8: [no title]

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