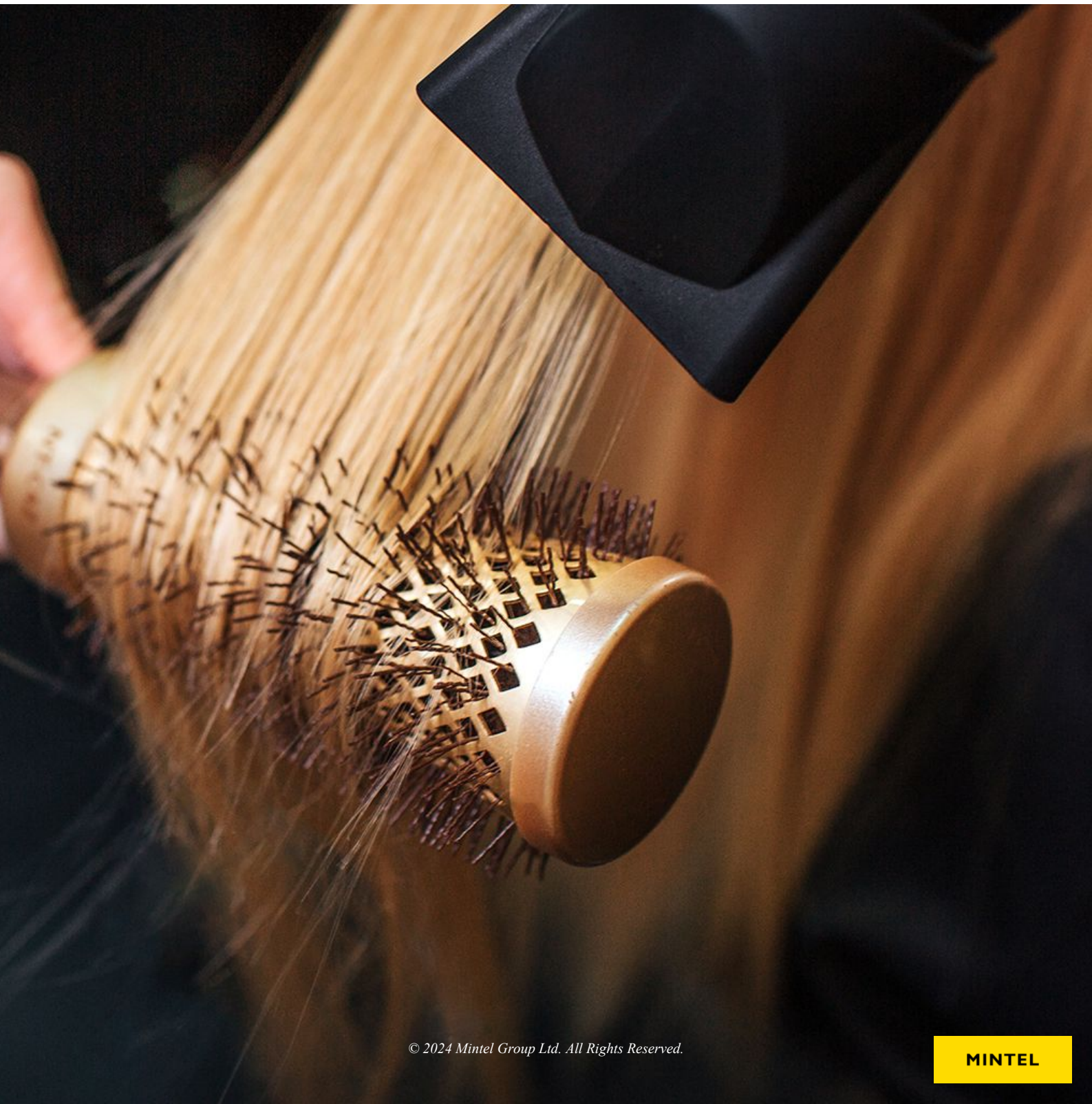


THE FUTURE OF HAIRCARE, STYLING & COLOUR: 2020

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



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Global Beauty & Personal
Care Analyst



Report Content

- What's in this report?
- Mintel synopsis

IMMEDIATE FUTURE: NEXT TWO YEARS

Hair: quality control

- Mintel recommends
- Hair health takes centre stage as consumers show concern over loss, growth and damage
- Promote hair loss solutions for all
- Tackle severe hair loss with new hair growth innovation
- Look to promising scientific breakthroughs – topical or ingestible
- Confront hair loss head-on at home with a Samsung device
- Address damage concern over hair devices
- New Dyson Corrale is more convenient and less damaging
- Connect hair quality to health
- Connect hair quality to health
- Broaden the offering when hair loss is inevitable
- Brands aimed at balding
- Reach consumers focusing on natural, healthy hair
- Be more inclusive and cater for protective styles
- Address scalp health concerns with natural dyes
- Address scalp health concerns with natural dyes
- Hair colour takes health concerns seriously
- Scalp care takes haircare approach from skin
- Focus on minimising damage
- Make scalp health the foundation for haircare
- L'Oréal and Nestlé jointly patent probiotic ingredients to treat dandruff
- Amorepacific innovates focusing on hair quality: growth and loss
- Target the scalp microbiome
- Continue to invest in scalp microbiome research

Haircare IS the new skincare

- Mintel recommends
- Take cues from skincare for scalp cleansing
- Take cues from skincare for scalp cleansing

The Future of Haircare, Styling & Colour: 2020

- Adjust to consumer haircare behaviour
- Develop staple shampoo use
- Expand men's routines
- Time for hair positioning to follow skincare into luxury
 - Graph 1: share of hair product NPD, by beauty price positioning, 2015-19
- Recognise those washing more or less
- Tap consumer interest in skincare ingredients for haircare
 - Graph 2: usage and interest in trying ingredients in hair products, 2019
- Look at ingestibles as a significant area for the future
- Opportunity to expand ingestible message in hair
- Demystify ingredients
- Provide familiar, convenient solutions
- Highlight speed and ease of use claims to men
- Streamline product selection
- Men prefer no-fuss haircare formats
- Address seasonal impact on hair and varying needs
- Relieve the stress of each season
- Promote seasonal attributes
- Look to South Korea for the hair makeup trend
- Hair cushions make an impact in South Korea
- New hairline corrector formats to captivate consumers
- How to use a hairline corrector
- Tap into consumer interest in hair fragrances
- Fill a market gap with standalone hair perfumes
- Hair perfumes on the market
- Hair perfumes on the market
- Target men with hair fragrance
- Target men with hair fragrance
- Expand haircare offerings with sophisticated scents
- Play with fragrance to provide unique sensory experiences
- Play with fragrance to provide unique sensory experiences

Help hair live its best life

- Mintel recommends
- Desire for a natural, healthy lifestyle drives product consumption
- Respond to interest in natural ingredients
- Respond to interest in natural ingredients
 - Graph 3: consumer usage and interest in haircare ingredients, 2019

The Future of Haircare, Styling & Colour: 2020

- Promote protein water as strengthening and volumising
- Beauty (specifically hair) is closely following the food trend for vegan products
 - Graph 4: share of NPD featuring vegan/no animal ingredients claims in selected sectors, 2015-19
- Beauty (specifically hair) is following the food trend for vegan products
- Take note of food's plant-based ingredient aquafaba
- Address sustainability concerns by using byproducts
- Promote animal-free claims
- Promote animal-free claims
- Get on board with the vegan beauty takeover
- Appeal to the eco-conscious and transumers with waterless, portable formats
- Appeal to the eco-conscious and transumers with waterless, portable formats
- Water is now driving innovation and the development of waterless products
- Follow in the footsteps of Code Zero – the world's first 'Lifetime Use Refillable' shaving and skincare brand
- Target men with a clear and 'clean' message
- Personalise solutions to meet individual needs
- Personalise solutions to meet individual needs

PLANNING AHEAD: NEXT FIVE YEARS

Hair science – it's in our nature

- Mintel recommends
- Be transparent to avoid mistrust
- Change the language to meet the need for 'clean' haircare
- Change 'clean' path to meet consumer demands on safety and efficacy
- Embrace DIY formulations to create the optimal product
- Address ingredient sourcing concerns
- Embrace biotech as science complements nature
- Target hair damage with biotech ingredients
- Provide hyper-personalisation using available technology
- Use hair data to engineer more effective products
- Use hair data to engineer more effective products
- Partner with tech companies
- Understand that the future of trust is a mix of smart tech, real experts and self-instinct

My hair is my identity

- Mintel recommends
- Recognise the importance of culture and connection
- Highlight the challenges and rewards of recognising hair diversity – it's Oscar-winning!

The Future of Haircare, Styling & Colour: 2020

- Change the marketing approach to focus on psychographics
- Make products that work for...work
- Tap into modern lifestyle demands
- How to use PAF 1-day hair tint
- Offer in-transit treatments to increase usage
- Create products for consumers going through hair transitioning
- Look to videos on tips to transition hair
- Provide advice and options for those in hair transition
- Have a key social strategy for hair – staying on top of trends is a MUST
- Make calls to action easy
- Engage, educate and entertain with #haircare on TikTok
- What is TikTok?
- Help style naturally with fewer products
- Showcase salons and barbershops as ideal third places
- Online platforms have seen growth, and they may be the best or only option in the short term
- Use social media to become more than a location
- Provide remote services for the geographically disconnected

Trust me, I'm a professional

- Mintel recommends
- Haircare: natural claims still lead the way as animal claims begin to trend
- Free-from and ethical on-pack claims have seen the biggest growth in the last three years
 - Graph 5: BI* haircare launches by top growth claims, 2017-19
- Styling: natural claims top the styling claims in the past year
- Specific claims see biggest growth on prestige styling packs
 - Graph 6: BI* hair styling launches by top growth claims, 2017-19
- Colour: convenience claims appear most on prestige colour packs
- Ethical and natural on-pack claims grow most in prestige colour over the last three years
 - Graph 7: BI* hair colourant launches by top growth claims, 2017-19
- Professional haircare inspired by skincare
- Continue sustainability efforts in salons
- Deliver convenience and reassurance
 - Graph 8: experience of professional hair services, 2019
- Deliver convenience and reassurance
- Make point of discovery purchases more enticing
 - Graph 9: purchase of professional hair products, July 2019
- Advice, experience and benefits are top reasons for buying professional hair products
- Offer a higher level of benefits

The Future of Haircare, Styling & Colour: 2020

- Meet the need for expert care and saving time
- Build trusting professional relationships with consumers
- Build trusting professional relationships with consumers
- Focus on the experience
- Make the destination experience personal and appealing
- Be more than just a salon
- Enhance the salon experience
- Scalp facials by Aveda and DIY products by Tsubaki
- Create a new category in salons
- People are open to going to non-salon environments for beauty treatments
- Make home the new 'it' destination: mobilise products and services
- Target men in salons and barbershops with what they want

FOUR WINNING STRATEGIES FOR THE FUTURE

- Four winning strategies for the future

MARKET OVERVIEW: KEY DATA AND INTERPRETATION

- Saturation and competition stalls developed markets, but fast growth is emerging
- COVID-19 outbreak is dictating how people live their lives
- Convenience, sustainability and specific benefits have broadest appeal

HAIRCARE

Market data

- Top five retail markets for shampoo and conditioner, 2020
- Top five retail markets for shampoo and conditioner, 2020
 - Graph 10: Top five retail markets for shampoo and conditioner, US\$ bn, 2020
- Turkey and Indonesia lead the way with fastest growth in haircare
- Growth expected to continue in emerging markets in Asia
- Japan outspends every other market for haircare products

Claims

- Top claims over the last five years
 - Graph 11: launches of shampoo, conditioner and treatments, % by leading claims, 2015-19

HAIR STYLING

Market data

- Top five retail markets for hair styling, 2020
- Top five retail markets for hair styling, 2020
 - Graph 12: Top five retail markets for hair styling agents, US\$ bn, 2020
- Emerging markets prosper while saturated markets struggle
- Russia's and Turkey's sales forecasts cool, but still post double-digit growth
- Although fast growth is predicted, India has lowest spend on styling

Claims

- Top claims over the last five years
 - Graph 13: launches of hair styling, % by leading claims, 2015-19

HAIR COLOUR

Market data

- Top five retail markets for hair colourants, 2020
- Top five retail markets for hair colourants, 2020
 - Graph 14: Top five retail markets for hair colourants, in US\$ bn, 2020
- Asian markets prosper with double-digit growth
- Developed markets arrest the slump but challenges still lie ahead
- Japan and Norway lead the spending on at-home hair colour

Claims

- Global: top claims over the last five years
 - Graph 15: launches of hair colourants, % by leading claims, 2015-19
- Contributors

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