



Trends-In-Sight: U.S. Hair Care Market Developments

By Amy Marks-McGee

According to Euromonitor International, the U.S. hair care market grew approximately 2% in 2013 and is predicted to generate \$2.7 billion for the period 2013-18 in nominal terms. In 2012, the total U.S. salon hair care market segment (services plus retail) reached sales of \$63.3 billion, up approximately 3.3%, according to Professional Consultants & Resources.

Within the U.S. hair care market, naturals with “free of” claims continue to be explored and stylists are launching their own lines using natural ingredients. Oil based formulas are the newest product application while dry and waterless shampoos are en vogue and hair perfumes are wooing the younger generation. Manufacturers and marketers are still trying to figure out how to capture the attention of men with new, targeted products.

Back to Nature

As explored in previous Trends-In-Sight articles, “naturals” continue to be a U.S. focus across beauty and personal care products. Hair care follows suit. “Free of” claims particularly “parabens” and “sulfates” are popular buzzwords among hair care launches. According to Transparency Market Research, an Albany based market research firm, the global demand for organic personal care products, was over \$7.6 billion in 2012 and is expected to reach \$13.2 billion by 2018. Hair care products accounted for nearly 25% of the total revenue in 2011.

In the mass market, Suave Professionals Natural Infusion is a new shampoo and conditioner line “infused with carefully chosen natural ingredients that contain no parabens and no dyes.” It’s available in Awapuhi Ginger & Honeysuckle Anti-Breakage, Macadamia Oil & White Orchid Moisturizing, and Seaweed & Lotus Blossom All Day scents. Clairol Herbal Essences debuted the Naked line “with 0% heavy residues, parabens, and dyes” in three ranges - Moisture with herbal mint fusion extracts, Shine with white tea and mint extracts, and Volume with white grapefruit and mint extracts.

Salon stylists Holly Dear and Kaycee Clark recently introduced the Dear Clark Salvation for Stressed Hair brand “made with natural active ingredients homegrown in Texas and crafted locally.” The five stock keeping units (skus) focus on three natural ingredients - certified organic aloe vera, Rose of Jericho also known as Resurrection

Plant, and sunflower seed oil. Purely Perfect designed by Michael Gordon, the founder of Bumble and Bumble, is a new line of three products utilizing natural, high grade ingredients that are paraben and sulfate free engineered to clean hair without using a detergent and without needing foam. The Cleansing Creme is referred to as the “un-shampoo” and uses aloe vera and essential oils. Celebrity hair-stylist Andre Walker, known to style Oprah Winfrey’s hair, launched The Gold System “for women who crave the natural look but fight the frizzies to obtain it.” The four product lineup is paraben free and sulfate free and features African Mongongo oil as the active ingredient.

Oil Strike

It is believed that the use of oil on oily skin or hair causes break-outs, clogged pores or greasiness. However, recently the press has been debunking the myth and it is said that oil helps restore the skin’s balance, protects the skin from aging and contains active ingredients in higher concentrations. Manufacturers are beginning to capitalize on this trend and are formulating oil based hair care ranges.

In 2013, Garnier Fructis introduced Triple Nutrition Miracle Dry Oil For Hair, Body & Face, a multi-use spray made with avocado, olive and almond oils. This year the company launched Garnier Fructis Marvelous Oil 5 Action Hair Elixir in three variants - Color Illuminate for Color Treated Hair, Deep Nourish for Dry, Damaged Hair, and Frizz Defy for Frizzy, Unruly Hair. Dove introduced the Pure Care Dry Oil line in four skus - Shampoo, Conditioner, Nourishing Treatment with African Macadamia Oil, and Restorative Treatment with Anatolian Pomegranate Seed Oil. Although not an oil, a notable new product to add moisture and volume to fine, flat hair is Dove Oxygen Moisture formulated with “Oxyfusion” technology. L’Occitane Body & Hair Fabulous Oil combines shea oil with African Baobab and Desert Date Palm oils. Based on Brazilian Buriti oil from the fruit of the Buriti palm tree also known as the Tree of Life, Aveda launched the Dry Remedy Moisturizing system in Daily Moisturizing Oil, Shampoo, Conditioner and Masque. Redken released the Diamond Oil collection formulated with apricot, camelina and coriander oils. Garnier introduced Olia, the company’s “first oil powered, ammonia-free permanent hair color.”

Hair Perfume

Spraying perfume on one's head to freshen the hair is a popular behavior, but the alcohol can be drying and damaging. Viktor & Rolf pioneered the hair perfume trend with the launch of Flowerbomb Bomblicious Hair Mist in 2008. The trend has caught on and there have been a variety of recent prestige and mass market launches.

Balmain Silk Hair Perfume contains silk protein and argan oil and features a blend of gardenia, white musk, sandalwood and peach accords. In the UK, Show by Show Beauty is a range of eleven hair styling products, which contain a "fine fragrance consistent across the variants." The Decadence Hair Fragrance has notes of rose water, coconut milk, caramel and almond butter, Madagascan vanilla, patchouli and white musk and is formulated with Vitamin E, aloe vera, Ultracas G20, and jojoba oil. Also a UK product, Unite Alanna Hair Perfume is free of parabens and Sodium Chloride, enhanced with UV protectants and said to prolong color and reduce static. Targeting a younger audience, celebrity scents such as Justin Bieber The Key, Taylor by Taylor Swift and Nicki Minaj Minajesty all offer a Hair Mist. Hair Shots by Amy are heat-activated fragrances designed for "girls on the go [to] keep their hair smelling sweet instead of sweaty" and are available in eight scents such as Cupcake, Cotton Candy, Watermelon, and Bamboo.

High & Dry Shampoo

Although it's an old technology, dry and waterless shampoos are making a comeback because they can be time saving, prolong a blow out, reduce styling time and decrease water usage. According to Mintel, a Chicago, USA-based market research firm, dry shampoos accounted for 3% of global shampoo launch activity in 2012. Salon brands and mass brands are both adding dry shampoos to their collections. Recent introductions include Bumble and Bumble Prêt-à-Powder, an "all-in-one hair powder featuring dry shampoo, style extending, and volume benefits" and Verb Dry Shampoo, a non-whitening formula that "refreshes hair, removes oil, boosts body and prevents damage from washing and styling." Toni & Guy introduced Cleanse Dry Shampoo while Pantene Pro-V launched three dry shampoos - Original Fresh, Blowout Extend, and Root Reboot.

You've Got Male

Men's grooming continues to be a point of interest and consumer packaged manufacturers are launching hair care products while there's been a resurgence in men's barbershops.

Unilever and Procter & Gamble took advantage of the U.S. Super Bowl, which aired on television on February 2, 2014, and introduced new men's hair care products through TV commercials. Axe by Unilever added new hair gels for men formulated to provide 24-hour

hold in three variants - Axe Spiked Up Look Extreme Hold Gel, Axe Clean Cut Look Wet Shine Spray Gel, and Axe Messy Look Matte Hold Gel. Old Spice by Procter & Gamble launched a range of hair care and styling products in eleven skus such as Kickstart Shampoo, Wolfthorn 2 in 1 Shampoo, Unruly Paste, and Deadlock Spiking Glue.

Nivea Men extended its 3-In-1 Body Wash line with Pure Impact and Maximum Hydration variants. Last year, Unilever expanded its Dove Men+Care line with the launch of four fortifying shampoos - Sensitive Scalp Fortifying 2-in-1, Fresh Clean Fortifying 2-in-1 with menthol and caffeine, Anti Dandruff Fortifying Shampoo developed with Pyrithione Zinc, and Thickening Fortifying Shampoo formulated with caffeine and calcium. Although not a scalp product per se, Dove Men+Care recently debuted an Expert Shave range in five products and Gillette introduced Gillette Body, the first razor designed for men's body grooming. Axe also added Peace shampoo to its lineup.

According to Cyrus Bulsara, President of Professional Consultants & Resources, men's salon/barber services and product sales showed nearly twice the growth of unisex salons in 2012. Some recent examples in New York City include The Corner Shop, a full-service barbershop, founded by Jeff Raider of Harry's Shaving Co. and Kiehl's full service barbershop, "a 162-year-old beauty brand."

Hair, There and Everywhere

The demand for natural hair care will continue and manufacturers of all sizes and independent brands will explore cleaner formulas and new, natural ingredients. Watch for more oil based products in all distribution channels, which use a variety of exotic nut oils as well as new and improved dry and waterless shampoos. Expect to see enhanced hair perfumes with multipurpose benefits such as moisturizing, smoothing, and strengthening attributes. In addition, ancillary hair mists will accompany new fine fragrance launches to attract younger consumers while products targeting men and their specific needs will continue to emerge. ■



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