HAIR CARE

MARKET SUMMARY It hasn’t been a good year for the hair care category in the Big 5. With the exception of the UK, all countries experienced a loss in value terms. This is disappointing news in a market which tends to be awash with innovation and NPD but perhaps indicates that customers are just making cutbacks when it comes to their hair care and styling needs.

France According to Symphony IRI France, the hair care market is not exactly full of bounce at present as it slipped by 2.2% in the past year to €1.183bn from €1.209bn the previous year. Even sales of conditioners, normally an extremely popular sub-sector in France, fell by 0.7% to total €197.2m. But gains have been made in the area of family shampoos which put on an impressive 11% to make €84.3m.

Germany The hair care category in Germany also made a loss in value terms, sliding by 0.9% to total €1.59bn in 2010, according to data from Symphony IRI Germany. However, hair care on its own did inch up by 0.3% to account for €484.35m while hair styling plummeted by 1.8% to total €439.63m. The last category of hair colourants also made a loss of 2.6% to make €307.12m.

Italy According to industry body Unipro, the Italian hair care market also fell by 2.3% to total €1.15bn, accounting for a 15.1% share of the total Italian C&T market. Shampoos, which are normally one of the most steadfast categories, also fell by 0.4% to make €490m while masks and conditioners dipped by 2.1% to total €152m. The biggest losses were recorded in the hair gels and waters sub-sector as it slid 4.5% to total €71.96m.

Spain Figures from Symphony IRI Spain show that the hair care category in the country fell by 3% in the past year to total €748.6m. The sub-sector of shampoos fell by 3% to total €289m, though volume sales for this area did grow by 3% in turn in the largely affordable retail channel of supermarkets and hypermarkets. This suggests that Spaniards now prefer to buy their shampoos with the weekly shop rather than make a separate trip to the perfumery or drugstore and indeed these retail channels have seen a drop in volume sales over the past year.

UK Things were faring better in the UK as the hair care market put on a robust 5.3% to total £1.16bn in 2010 while volume sales did fall by 1.5% to make 509.48m units, according to Kantar Worldpanel. Of the individual hair care categories, shampoo remained the largest, maintaining its 32% market share and growing 4.9% year-on-year while hair colourants, which command a 23.3% market share, grew by 11%. The conditioner market remained steady at 21.7%, growing 1.2%, while women’s hairsprays grew 10.5% to take a 10% market share.

Europe: Top 5 hair care brands by country

<table>
<thead>
<tr>
<th>Total Big 5</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>Spain</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 L’Oréal</td>
<td>L’Oréal</td>
<td>Schauma</td>
<td>L’Oréal</td>
<td>Pantene</td>
<td>Head &amp; Shoulders</td>
</tr>
<tr>
<td>2 Pantene</td>
<td>Head &amp; Shoulders</td>
<td>Nivea</td>
<td>Pantene</td>
<td>Delipius</td>
<td>Pantene</td>
</tr>
<tr>
<td>3 Head &amp; Shoulders</td>
<td>Fructis</td>
<td>Head &amp; Shoulders</td>
<td>Fructis</td>
<td>Head &amp; Shoulders</td>
<td>L’Oréal</td>
</tr>
<tr>
<td>4 Fructis</td>
<td>Dop</td>
<td>L’Oréal</td>
<td>Sunsilk</td>
<td>L’Oréal</td>
<td>Alberto</td>
</tr>
<tr>
<td>5 Nivea</td>
<td>Yves Rocher</td>
<td>Wella</td>
<td>Clear</td>
<td>Fructis</td>
<td>TRESemmé</td>
</tr>
</tbody>
</table>

Source: Kantar Worldpanel European Toiletries and Cosmetics Database (ETCD). Rankings refer to weighted penetration (% using) among women over the 12 months ended June 2011. For more information on this contact Benjamin Cawthray (benjamin.cawthray@kantarworldpanel.com) or Roz Worcester (roz.worcester@kantarworldpanel.com)
France: Hair care, colourants and styling markets, 2011*

<table>
<thead>
<tr>
<th>Category</th>
<th>£m</th>
<th>%+/-%</th>
<th>Units £m</th>
<th>%+/-%</th>
</tr>
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<tbody>
<tr>
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<td>-2.8</td>
<td>220.8</td>
<td>-1.6</td>
</tr>
<tr>
<td>Shampoos</td>
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<td>-0.3</td>
<td>140.8</td>
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<td>Adult shampoos</td>
<td>339.4</td>
<td>-2.7</td>
<td>104.4</td>
<td>-1.9</td>
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<td>Family shampoos</td>
<td>84.3</td>
<td>10.8</td>
<td>31.4</td>
<td>2.2</td>
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<tr>
<td>Children’s shampoos</td>
<td>13.0</td>
<td>-3.3</td>
<td>5.0</td>
<td>-3.1</td>
</tr>
<tr>
<td>Conditioner/care products</td>
<td>192.7</td>
<td>10.8</td>
<td>47.1</td>
<td>0.3</td>
</tr>
<tr>
<td>Conditioners</td>
<td>141.8</td>
<td>-0.2</td>
<td>36.7</td>
<td>-0.1</td>
</tr>
<tr>
<td>Lotions</td>
<td>9.3</td>
<td>-13.4</td>
<td>1.9</td>
<td>-10.6</td>
</tr>
<tr>
<td>Care products</td>
<td>40.1</td>
<td>0.1</td>
<td>8.3</td>
<td>0.7</td>
</tr>
<tr>
<td>Masks</td>
<td>1.5</td>
<td>32.2</td>
<td>0.2</td>
<td>46.9</td>
</tr>
<tr>
<td>Colourants</td>
<td>259.0</td>
<td>-2.5</td>
<td>31.7</td>
<td>1.1</td>
</tr>
<tr>
<td>Highlights</td>
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<td>-26.0</td>
<td>0.5</td>
<td>-20.7</td>
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<tr>
<td>Tone on tone</td>
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<td>-1.6</td>
<td>5.0</td>
<td>-20.7</td>
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<td>Permanent</td>
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<td>1.4</td>
<td>0.5</td>
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<td>-3.6</td>
<td>1.7</td>
<td>-4.3</td>
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<tr>
<td>Temporary</td>
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<td>-9.1</td>
<td>0.8</td>
<td>-9.3</td>
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<tr>
<td>Others</td>
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<td>0.9</td>
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<td>Perms</td>
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<tr>
<td>Kits</td>
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<td>Total hair styling</td>
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<td>Styling products</td>
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<td>46.3</td>
<td>-4.3</td>
</tr>
<tr>
<td>Waters</td>
<td>3.2</td>
<td>-9.7</td>
<td>1.0</td>
<td>-8.2</td>
</tr>
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<td>Gels</td>
<td>94.8</td>
<td>-7.2</td>
<td>24.8</td>
<td>-3.7</td>
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<tr>
<td>Sprays</td>
<td>58.4</td>
<td>-7.0</td>
<td>12.9</td>
<td>-6.6</td>
</tr>
<tr>
<td>Mousses</td>
<td>26.2</td>
<td>-3.5</td>
<td>6.1</td>
<td>-3.1</td>
</tr>
<tr>
<td>Others</td>
<td>5.9</td>
<td>9.0</td>
<td>1.5</td>
<td>2.8</td>
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<tr>
<td>Hairsprays</td>
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<td>18.7</td>
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<tr>
<td>Normal hold</td>
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<tr>
<td>Soft hold</td>
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<td>Strong hold</td>
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<td>0.8</td>
</tr>
<tr>
<td>Others</td>
<td>21.8</td>
<td>-13.6</td>
<td>4.4</td>
<td>-12.5</td>
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</table>

*Sales through hyper/supermarket, year to 29 May 2011

Source: Symphony IR France

**Taking the rough with the smooth**

With the latest mass market hair care products bearing names such as Ultimate Repair and Full Restore it is clear where innovation is focused in this market. So it’s a pity that mass market performance for both the hair care and styling categories in France did not enjoy similar restorative measures over the past year. The total market slipped by 2.2% from €1.209bn in 2010 to €1.183bn by May this year, which shows that the market is going through a downbeat phase.

According to Symphony IR France, total hair care sales through hypermarkets and supermarkets for the year to 29 May 2011 were down by 2.8% to €895.5m while hair styling sales fared even worse, retracting by 4.3% to €288.1m. Even sales of conditioners, which in the year to 30 May 2010 had grown by 2.6%, have since been damaged, falling by 0.7% to €197.2m. However it is interesting to note where gains have been made – the small hair masks category grew by an exponential 32% to €1.5m, indicating the popularity of the trend for deeper caring treatments with consumers. Family shampoos also fared well, gaining nearly 11% to €84.3m, possibly due to shoppers trying to cut the cost of their shopping basket with a sole shampoo purchase for their household.

The mass market may be the largest distribution channel for hair care and styling products, taking approximately 75% of sales, but it is by no means the whole story. Michelle Strutton, senior consumer analyst at Mintel comments: “The French market is the most premium-oriented of its European neighbours, with masstige and prestige brands, including salon marques, playing an important role.” According to industry sources, hairdressing salons account for as much as 12% of hair product sales in France, followed by pharmacies and direct sales with 5% each and the selective market (perfumeries at 3%). And while the performance of the mass market wasn’t one to turn any heads, the pharmacy channel enjoyed a much more glossy year. A spokesperson from Phyto International Marketing says that “pharmacies grew by 1.2% in value and 2.44% in volume”.

According to Mintel, the overall picture is also a little smoother. Strutton believes that the shampoo market benefited from “improving consumer confidence and managed to record modest growth in 2010”, up 0.3% to €678m. Styling, colourants and treatment products experienced a 3.3% dip to an estimated €1.9bn, however this was seen as a brief stumble, says Strutton: “In France colourants are one of the rare hair care categories to defy the declining market, growing steadily since 2006 and are set to continue to do so.” But it’s conditioners that have really shone through, growing by 2.5% to €414m in 2010 (Mintel).

Strutton explains: “Thanks to the importance of masstige and prestige brands, the French market is by far the largest of the Big 5 with a value of €414m. This is in spite of French women having the lowest take-up (48%) and frequency of using conditioners. After two consecutive years of contracting demand, the 2.5% growth registered in 2010 is very good news. At the peak of the recession, women started to visit hair salons less frequently, bought at-home treatments and downgraded to more affordable products, but now...
The repairing ingredients in Phyto’s new Phytokératine range include botanical keratin and hyaluronic acid to help fortify the hair shaft.

### France: Retail value sales of hair styling, colourants and treatments, 2006-2013

<table>
<thead>
<tr>
<th>Year</th>
<th>€m</th>
<th>% share</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>2,170</td>
<td>-7.6</td>
</tr>
<tr>
<td>2007</td>
<td>2,159</td>
<td>-0.5</td>
</tr>
<tr>
<td>2008</td>
<td>2,050</td>
<td>-5.0</td>
</tr>
<tr>
<td>2009</td>
<td>2,018</td>
<td>-1.6</td>
</tr>
<tr>
<td>2010 (estimated)</td>
<td>1,952</td>
<td>-3.3</td>
</tr>
<tr>
<td>2011 (forecast)</td>
<td>1,949</td>
<td>-0.2</td>
</tr>
<tr>
<td>2012 (projected)</td>
<td>1,919</td>
<td>1.5</td>
</tr>
<tr>
<td>2013 (projected)</td>
<td>1,912</td>
<td>0.4</td>
</tr>
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</table>

Source: Mintel GMN

### France: Retail value sales of shampoo, 2006-2015

<table>
<thead>
<tr>
<th>Year</th>
<th>€m</th>
<th>% share</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>730</td>
<td>-2.0</td>
</tr>
<tr>
<td>2007</td>
<td>712</td>
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</tr>
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<td>2008</td>
<td>683</td>
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<tr>
<td>2009</td>
<td>676</td>
<td>-1.0</td>
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<tr>
<td>2010</td>
<td>678</td>
<td>0.3</td>
</tr>
<tr>
<td>2011 (estimated)</td>
<td>678</td>
<td>0.0</td>
</tr>
<tr>
<td>2012 (forecast)</td>
<td>687</td>
<td>1.3</td>
</tr>
<tr>
<td>2012 (projected)</td>
<td>700</td>
<td>1.9</td>
</tr>
<tr>
<td>2014 (projected)</td>
<td>696</td>
<td>-0.6</td>
</tr>
<tr>
<td>2015 (projected)</td>
<td>703</td>
<td>1.0</td>
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</table>

Source: Mintel GMN

### France: Retail value sales of conditioners and treatments, 2006-13

<table>
<thead>
<tr>
<th>Year</th>
<th>€m</th>
<th>% share</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>400</td>
<td>1.0</td>
</tr>
<tr>
<td>2007</td>
<td>406</td>
<td>1.5</td>
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<td>2008</td>
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<td>2014 (projected)</td>
<td>434</td>
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</tr>
<tr>
<td>2015 (projected)</td>
<td>446</td>
<td>2.8</td>
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</table>

Source: Mintel GMN, IRI/Mintel

Products for dry, ultra-dry and coloured hair. The number of people with weakened, damaged hair continually increases (one out of two women say they have damaged hair) as there are more and more external influences that alter the inner hair structure: Mechanical (blow drying, straightening tongs), chemical (colour treatments, bleaching) and environmental factors (sun, pollution, salt, wind).” The trend has spread from conditioners to shampoos, with many brands launching entire ranges designed to help repair damaged hair. Strutton says: “Shampoos designed to prevent and treat hair damage have been among the best performers in recent years and, together with shampoo for dry hair, form the largest sector of the French shampoo market (22%).” As a result, it has become increasingly important for brands to offer comprehensive repairing benefits and this year many new product launches are focusing on offering exactly this. Sylvie Mouchon, group marketing director of European hair styling salon operator Provalliance notes: “In 2011 the trend is deep care, with repair and anti-ageing ranges.”

### Hair care repair

Phyto is one such brand that is focusing on this important trend with the launch of PhytoKératine. The range of three products – Reparative Shampoo, Reparative Conditioning Treatment and Reparative Serum – draws inspiration from the dermatological technique of Lipofilling with Kerato-Filler, an intra keratin fibre filler which is claimed to help restore the inner hair substance. The filler contains a combination of botanical keratin and hyaluronic acid, while the products also promise to work on the cuticle to even out the surface of the fibre in order to provide protection, with the help of botanical origin ceramides and pomegranate extract. “Together, these four active ingredients act on both the inside and outside of the hair fibre to leave hair appearing more repaired and protected, supple and shiny.”

The mass market has seen an influx of ultimate repair products this year too, with L’Oreal Paris launching Elsève Full Restore 5 60 Second Saviour, an intensive conditioner that incorporates pro-keratin and ceramide to help replenish and reinforce hair fibres to leave them feeling stronger and more resistant. The soft formula is also claimed to seal the cuticles and restore softness to the hair and features a light, gel/cream texture and delicate fragrance.

Nivea’s (Beiersdorf) latest range includes both hair care and styling products and is specifically targeted to repair and strengthen long hair from the roots to the tips. According to Nivea, 50% of French women have long hair so its new range, Nivea 1-2-3 Long Repair is designed to specifically respond to their needs, correcting the damage caused by brushing and hair bands. The formula is enriched with keratin, babassu oil and oryzanol rice bran oil to help strengthen and smooth hair and the range, which launched in January, includes a shampoo, conditioner, one-minute mask, detangling spray, styling mousse, styling spray and hairspray.
Gliss (Schwarzkopf & Henkel) has adopted a more luxurious look for its Ultimate Repair line, with the black and gold packaging designed to project a professional and high performance image. The formula is designed to intensively repair extremely dry and broken hair by filling the specifically damaged areas of the hair fibre, claiming to reduce hair breakage by up to 95%. Products include shampoo, conditioner, one-minute repairing mask and repairing gloss. The brand has also recently launched a repairing range for frizzy hair called Satin Relax comprising a shampoo, express conditioning milk and anti-frizz 1 minute mask. The formula, with its anti-frizz complex and apricot kernel oil extract is said to leave hair looking smoother, more shiny and intensively repaired.

Dry hair is also a central focus for professional hair care ranges, in fact for Matrix Biolage (L'Oréal) its nourishing range for dry hair, Hydratherapie, is the brand’s best selling range worldwide. This year the formula has been improved with more natural-inspired ingredients such as aloe vera and passionfruit to provide intensive nourishment, while the brand has also launched two new star products: Aqua-Immersion Crème Masque, providing rich, deep moisturisation for dry hair to leave it more manageable, shiny and protected; and Hydra-Seal Brume Adoucissante, a light leave-in mist that instantly nourishes, softens and protects against moisture loss.

In keeping with the hair repair trend, hair oils are making a comeback amongst premium brands, offering consumers a luxurious way to repair and nourish their hair. Many of the latest products are designed to be pampering salon-style treatments for home use and some are versatile enough to be used on the skin as well as the hair. Roger & Gallet’s Huile Sublime Bois d’Orange is a hydrating hair, face and body spray, recently launched in a new 30ml travel size while Kérastase (L’Oréal) Elixir Ultime Versatile Beautifying Oil is enriched with a complex of four oils and claims to repair, nourish and protect hair, leaving it shiny and soft. René Furterer’s (Pierre Fabre) Karité Huile Nutrition Intense, part of the brand’s recently launched shea butter hair care line, is a treatment designed to be used before shampooing hair to provide intense nutrition to help regenerate the hair. The orange blossom fragrance and the richness of the oil are said to provide a pleasurable experience. Other recent launches in this vein include Shu Uemura Art of Hair Essence Absolue Nourishing Protective Oil and Diptyque Satin Oil for body and hair.

Natural focus

Natural and organic products have become a key driver for product innovation within hair care and continue to grow increasingly important. “Natural is back in the centre of innovation and communication,” says Phyto’s spokesperson. “There is a tendency towards the innocuous: no silicones, no parabens, no colourants, no sulphates. Product efficiency has become more and more important and people tend to want to know the ingredients and their concentrations in products.”

Certainly this trend has been heightened by various ingredients and product scares in the media, with significant media attention being drawn to Brazilian hair straightening treatments in January for reportedly containing high levels of formaldehyde. A number of products were removed from the French market containing formaldehyde in concentrations of between 0.61% and 5.87%, according to French health authority Asfapps and DGCCRF (The French competition, consumption and anti-fraud authority), as this was higher than the 0.2% allowance stipulated in the EU Cosmetics Directive.

This sort of media attention raises consumer concerns about ingredients and creates an ideal situation for brands focused on free from, natural or organic formulations and treatment products that appear to be benefitting as a result. Mouchon says: “The big trend in treatment is silicone-free, natural, or even organic, and consumers are willing to pay a premium for this.”

Jean-Claude Biguine extended its organic Biguine Bio range as a direct response to the growth of the natural trend. Brian Feinman, marketing director explains: “People are more and more concerned about green issues, about preserving the planet, social responsibility and are more orientated towards organic products. The range is free from parabens, silicones and is 100% natural. Increasing numbers of clients appreciate these products.”

Groupe Planète Bleu has extended its Ecocert-certified Born to Bio line with an extra gentle shampoo formulated with Brazilian babassu oil and an organic shampoo with argan oil. The products exclude parabens, glycol, phthalates, phenoxyethanol, colourants, colouring agents, silicones and PEGs. Meanwhile other brands have relaunched their ranges with a more authentic natural positioning, such as the Ecocert-certified Laboratoires Biocos Lovea Bio Le Monoi moisturising conditioner, which was launched to replace the Laboratoires Serval Lovea Bio Monoi de Tahiti range. The new product is formulated with 100% natural ingredients, 29% of which are organic. The paraben-free conditioner is designed to hydrate hair, leaving it easier to comb.

Bright outlook

As many as two out of three French women colour their hair so it is little wonder that this category is larger in France than it is elsewhere in Europe, valued at a staggering €612.9m in 2009 according to Mintel. Strutton says: “Colourants are one of the rare hair care categories to defy the declining market, growing steadily since 2006 and set to continue to do so after a brief stumble in 2010.” Indeed, the response from the industry is positive for this year due to some innovative new launches that are brightening the outlook for the category. Feinman comments: “The colour category should grow this year as
leaving it smooth and shiny. Joining the shampoo and conditioner is the star product of the line, Concentré Fixateur de Couleur, which helps to restore the natural waterproof qualities of the hair for up to eight weeks, ensuring that the hair’s coloured pigments do not wash away as easily. Professional brand Sebastian (P&G) has explored a new direction for colour protection products with the new line Color Ignite since the range is designed to meet the specific needs of different types of coloured hair. The Mono range is adapted for hair that is coloured in just one shade and Multi is suitable for hair that has been coloured with several different shades or lightened. According to an Institut GFK study for Le Petit Marseillais (L’Oréal), 11% of those women who colour their hair look for products containing natural ingredients. The brand’s new range, Shampooing Eclat Couleur is well positioned to attract this group of women since the five products in the line are based on natural extracts of blueberry and safflower oil. Designed to protect and prolong hair colour while

some of the brand leaders have launched new foam products that are easy to use and have a lower price point than salon colour.”

Leading the way in foam colourants in France is L’Oréal Paris Sublime Mousse by Casting, which claims to be the new generation in home colourants. The formula borrows from Japanese home colourant trends where foam hair colour is the fastest growing segment of the home colour market. The unique foam texture is applied by massaging in like a shampoo and expands around the hair to allow even coverage, without overloading the hair. There are 11 shades available and the non-drip product is delicately scented with a combination of blackcurrant sorbet, apple nectar, freesia, velvet peach, raspberry and sweet amber.

Elsewhere, manufacturers have kept up the pace with new colour protect shampoos, with Pantene (P&G) launching Pro-V Color Protect & Lisse, said to protect and prolong coloured hair while

Organic boost

This month salon chain Jean-Claude Biguine is extending its retail line of organic, 100% natural origin hair care products with five new shampoos, a conditioner and a mask. The brand’s Cosmébio-certified Biguine Bio range originally launched in 2008 and is sold through and used in the salons. ECM talks to Jean-Claude Biguine’s marketing director, Brian Feinman, about the rising demand for organic hair care in France

How important is it for a hair care brand to offer an organic range now in France?

It’s an important trend today and all sorts of brands – mass, multinationals, premium and professional – are launching their own organic and natural lines. People are concerned with their own health as well as the environment in which they live and are aware of studies that say that some ingredients such as parabens are dangerous, especially on the scalp. Consumers today are well versed on the organic subject which allows them to carefully examine labels and compare them with other traditional products.

What are consumers specifically looking for from natural and organic hair care products? Are more consumers looking for organic products over and above those with ‘natural’ claims?

Consumers’ main concern is to care for and nourish their hair and scalp by using the finest natural botanical ingredients from plants, flowers and fruits as active ingredients in formulas. They are more aware of the differences between natural products and organic products, and there are many more articles in the press and in women’s magazines about it. Consumers are not fooled anymore.

How do you think the organic hair care and styling market will develop in France?

Organic lines have mostly been in hair care as it is more difficult to create organic styling products. But organic styling products will develop and I would like our brand to get into this too. It’s the same for colour – it’s a very big formulation challenge to get colour that is natural and will stay. There is a long way to go, but it will happen.
The German hair care market, which includes all styling and colourant products, has been fairly static in the last year, putting in a somewhat lacklustre performance. According to figures from Symphony IRI Germany, the hair care market value slipped by 0.9% from €1.64bn in 2009 to €1.59bn in 2010.

Looking at value sales in more detail, hair care products (including shampoos, conditioners and treatments) accounted for the vast majority of the total market with a 53.2% market share and worth €848.35m. With a 27.6% market share, hair styling products (including gels, creams, waxes, setting products and hairsprays) came next with a total of €439.63m. With a 19.3% share of the market, which was valued at €307.12m and this included permanent, semi-permanent and temporary colourant products. When it came to how each sub-sector performed, hair care products grew by 0.3%, while hair styling and colourant products slipped by 1.8% and 2.6% respectively.

While the French hair care, styling and colour markets have been aghast with mixed fortunes over the past year, the industry is positive about the year to come. Mintel’s 2012 projections indicate that the market will enjoy a spurt of growth, and Feinman says: “I believe the market will grow this year due to new organic products, new colour products, and the fact that clients are buying more products to do as treatments at home.” Manufacturers are also clear about which segments could drive future growth. Mouchon says: “In terms of styling, we are looking towards semi-permanent styling, for example the three or six week smoothing kits launching under the LaScad license for Jean Louis David. Hair care is following the same path as dermocosmetics, which explains the growth of anti-ageing products and the interest in specific ethnic groups.” Phyto’s spokesperson believes that major innovations will be developed for thinning hair and that growth will also be driven by anti-ageing hair products, botanical colourants and cleaner formulas. Indeed, new products from Yves Rocher’s Anti-Chute Shampooing Stimulant, which uses natural vegetable extracts and works by stimulating blood circulation to the scalp in order to encourage hair growth, and René Furterer’s Tonucia Sérum Tonus Redensifiant, an anti-ageing serum based on natural extracts and plant peptides said to leave hair looking thicker, are likely to pique consumer interest and push the repair trend to the next level. Maybe if innovations like this are introduced by mainstream brands, they could even help to restore the receding mass market.

Germany
A static situation

The German hair care market, which includes all styling and colourant products, has been fairly static in the last year, putting in a somewhat lacklustre performance. According to figures from Symphony IRI Germany, the hair care market value slipped by 0.9% from €1.64bn in 2009 to €1.59bn in 2010.

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Volume wise things fared a little more positively inching up by 1.7% to climb from 217.6m units in 2009 to 221.3m units last year. Looking at the sub-sectors, hair care products grew by 2.6% to total 103.7m units, while hair styling products were not so prosperous, sliding by 1.9% to make 46.01m units. Hair colourants on the other hand did have a more vibrant year, putting on 3.1% to account for 71.53m units in volume terms. In terms of market share, while hair care products still dominated with a 45.3% market share, colourants actually came next in line here with 33.4% leaving styling skus to take third place with just 21.2%.
Drugstores do it again

The retail category threw up few surprises in terms of where German consumers actually purchased their hair care items from, with the ever popular drugstore channel dominating with a 62.5% share in 2010, ringing €996.75m worth of business through its cash registers. Hypermarkets and supermarkets of over 800sqm were in second place with a 25.3% share, worth €402.45m. Discounters including Aldi took an 8.6% slice of the market, worth €140.07m, while hypermarkets and supermarkets of less than 800sqm took a tiny 2.6% market share which accounted for €42.59m in sales and then the perfumery channel took the even smaller 0.9% share with just €13.23m.

No German hair care report would be complete without mentioning German behemoth Schwarzkopf & Henkel with the first part of the business not only being the biggest name in hair in Germany but one which is growing in prominence every year.

Schwarzkopf has rolled out many new products in the past year across its many hair care and styling brands, with the major launches starting in January of this year.

The beginning of the year saw Schwarzkopf extend its popular Live Colour XXL line-up to 22 shades, now ranging from platinum blonde to deepest black. There are three brand new shades for 2011, Plum Perfection, Rich Caramel and Max Blonde, the formulas for which have been created with caring extracts of pomegranate and vitamin C to nourish and soften the hair while it is coloured.

February saw five new skus make it to market. Powder'ful from the got2be styling range is claimed to be the first styling powder on the German market and once shaken from the tin it creates a matte, tousled look for all hair types. Next up were two new ranges in the Syoss brand; Smooth Relax is a hair care range for the consumer wanting sleek hair, which contains a shampoo, conditioner and mask; and Hold & Smooth is the other range which comprises a hairspray, styling foam, anti-frizz lotion and smoothing balm. Syoss also chose this time to debut Syoss Men which is the brand’s first ever male hair care and styling range, containing three shampoos and four styling products.

Drei Wetter Taft’s Powerful Age is the new styling product from the Taft line and has been created especially for thinning and older hair. It contains an extra dose of keratin to help repair damaged strands promising thickness and hold. The latest addition to the Gliss Kur range meanwhile was Satin Relax. This range is suitable for dry and frizzy hair and comprises a super hydrating shampoo, conditioner, leave-in conditioning spray and intensive treatment. Schwarzkopf claims that these products help hair stay frizz-free even in high levels of humidity.

And rounding out the new arrivals for February were two new shampoos in the Schauma range, featuring superfruits goji berry and acai berry. SuperFruit Nourishing Care comprises one shampoo with cranberry and goji berry and one with acai berry and pomegranate.

In March, Schwarzkopf extended the Schauma line further with the arrival of three new leave-in Schauma conditioning sprays for coloured, dry or damaged hair respectively. There were also three new got2be styling skus unveiled; Keep on Rockin’ comprised an extra hold hairspray, a spray-on dry shampoo and a hair gel. The bottles are all in keeping with the trendy look of this range and are adorned with roses, hearts and various rock n’roll tattoo imagery.

In May, there were three new arrivals as Schwarzkopf continued to ratchet up its launch activity. Syoss Mixing Colours is a new colourant activity. Syoss Mixing Colours is a new colourant skus can achieve the multi-tonal effect normally only obtained via a salon visit. May also saw a major brand relaunch for the entire Gliss range with new packaging designs and new formulas. As part of this relaunch Gliss Kur with Ultimate Repair was rolled out for extremely damaged hair. This range included a shampoo, conditioner, leave-in conditioner and
three intensive treatments. The latest SKU to arrive from Schwarzkopf this year was Schauma's Apple Blossom Shampoo which forms part of a limited edition relaunch of one of the brand’s best selling shampoo lines, which originally made its debut in 1977.

Upping the style stakes
Over at P&G brand Wella, one of Schwarzkopf’s main competitors in the hair styling stakes, there was also a good deal of activity. January this year saw the arrival of Wella’s Pro Series range which aimed to directly compete with Schwarzkopf’s Syoss brand in that it offers consumers salon-style hair products at non-salon prices. Prices are a very affordable €3.99–€5.99.

There are four sub-sectors within the Pro Series Line-up – Colour, Repair, Volume and Shine – with a shampoo and conditioner in each, both in the popular 500ml format. There are also three styling ranges – Volume, Strong Hold and Max Hold – each with a hairspray and styling foam. The Volume range has an additional Volume Hair Mousse which the company claims is the first time a product with this texture has been launched in the mass market in Germany. It has a liquid consistency which transforms into an airy mousse when the pump dispenser is activated. The Max Hold range also has an additional hair gel.

Nivea new arrivals
Beiersdorf has a wide range of hair products available in Germany which sell nearly as well as its skin care and sun care offerings. There were two new debuts from the brand in the past year. Up first was Nivea Colour Crystal Gloss featuring pioneering liquid crystals which is a hair care and styling collection that protects coloured hair and leaves it looking as if it has been freshly dyed. With coloured hair more susceptible to wear and tear, colour wash out and styling damage, this new range aims to repair damage, provide shine, protect against UV rays, protect from heated products and above all seal the colour into the hair. The liquid crystal technology is similar to the hair’s own lipids which replenish the health of the hair and which are very often missing in stressed and damaged hair.

Professor Frank Schwanke, head of product development at Nivea Hair, comments: “We went looking for ingredients that could replace these lost lipids in order to compensate for any damage already done. We were able to find liquid crystals which are structurally very similar to the lipids that are naturally found inside the hair shaft.

“These create a ray of iridescent colour and shine on the hair and are responsible for repairing damage and maintaining lustrous shine. The formula also contains an antioxidant compound of rice oil, which protects the hair against damage caused by free radicals, and a UV filter which protects the hair against the sun’s harmful rays by creating a protective shield which also helps to minimise colour fade.”

The next offering from the Nivea stable came in the form of new Style Freeze for Men, which Beiersdorf claims is a “new styling range that raises the bar with new formulas, new textures and new designs”.

The Style Freeze range creates stable but elastic hold for every single style which lasts and lasts, according to the company, with the idea being that the three new products literally ‘freeze’ any hairstyle into place.

The new products also have new textures whether it’s the thick gel consistency of Freeze Extreme Styling Glue or the cool, refreshing tingle of Freeze Cracking Styling Gel.

The first product comes in packaging...
reminiscent of an ice cube and offers the consumer an extremely strong formula for the maximum level of hold with an alcohol-free formula. The second product crackles and tingles as soon as it comes out of the bottle for a new sensorial experience and extra hold for hair.

There are also two other new products, the first being Style Freeze Elasto Power Styling Gel with elastic-like fibres which stretch just like chewing gum to give hair a more moveable, elastic hold. Lastly, Freeze Shampoo contains an innovative, cooling formula with refreshing lime extract to cleanse the hair with a long lasting hit of freshness.

**Nourishing protection**

One key launch of last year came from Unilever brand Dove which rolled out the new Dove Nourishing Oil range in October of last year. This is a range of products designed specifically to revive dry, rough and frizzy hair which boosts the brand’s innovative Weightless Nutri-Oils System. This blend of natural almond and coconut oils penetrates the hair shaft rapidly to replenish and nourish dry hair from within, smoothing up to 100% of the hair’s surface to lock in moisture and control frizz, according to Unilever. The new range, which includes a shampoo, conditioner and express treatment conditioner, builds on the recent relaunch of the Dove Hair Therapy range.

Marlies Möller, which was sold by Beiersdorf to Austria’s Troll Cosmetics in December, had two key roll-outs in March. These were Daily Repair Rich Shampoo and Repair Oil Treatment which both contain passionflower oil and gold of pleasure oil to lend the hair a silky, shiny appearance which makes it easier to comb and style as well as protecting the hair from damaging environmental influences. The main premise of the range is to protect hair from drying out.

Daily Repair Rich Shampoo provides intensive care for dry and brittle hair as well as lending it a shimmering shine. The active ingredient, polymoist, provides additional moisture to strengthen the hair and give it new resilience. The shampoo can be used every day and is particularly suitable for sensitive scalps, according to the company.

The Repair Oil Treatment gives hair shine and suppleness as the passionflower and gold of pleasure oils envelop the hair strands, repair the damaged structure and provide repairing nutrients, without a sticky, oily residue. This is a two-phase product that combines the ingredients in both oil and water which should be mixed together by shaking the bottle before application, says Marlies Möller.

According to recent data from Symphony IRI Germany, the hair care and styling market in the country has been somewhat static in the past year, but this was not the case when it came to innovation and new launches. Hair care and styling is one of the areas where German companies really excel and they proved this with the wide range of skus that made it to market. Hopefully with this level of activity continuing, the figures will soon catch up.

**Locking in moisture at Marlies Möller**

Dr Harald Albrecht, left, is director of corporate product development at Marlies Möller. He talks to ECM about what benefits using Daily Repair Rich Shampoo and Repair Oil Treatment will bring together will you obtain the optimum results for the hair. Passionflower and gold of pleasure oils are in the oil phase, as is vitamin E to protect against antioxidant stresses.

The counterbalance is the water phase, with moisturising glycerin, heat protection and UV filters. In both cases the ingredients are bedded in the phase that allows them to develop best.

This range aims to combat dry hair. Are women the primary sufferers of this complaint? No, both men and women can inherit this tendency and in addition men also wash their hair slightly more often than women do which can have an effect. They also colour their hair and expose it to the same environmental stresses that women do on a daily basis.

And, in comparison to women, men use more styling products on their relatively short hair but they seldom brush the products out of their hair in the evening which is a bad habit. All of these factors can lead to dry hair so men also need to use repairing hair care and styling products in order to take care of it.
Italy
Losing its shine

In 2010 hair care and hair styling ranked in third place in the Italian C&T market, behind body care and facial skin care and holding a 15.1% share of the total market. Last year the category fell by 2.3% to a value of €1.153bn, according to industry body Unipro, however insiders believe that demand for hair products remains on the rise in Italy, as both the increased media spend on these products and the level of creativity employed by brands is evident. Hair styling though is really suffering as a category, given that many adults have shown environmental and health concerns about using the products. Teenagers are the only segment to still crave these products in Italy but given that they don’t really have the purchasing power to afford them, the benefits they bring to the category are limited.

No surprise then that last year value sales for all hair styling products slid, while the most purchased product remained hairsprays (41%), followed by gels (32.6%), mousses (21%) and other products (5.5%) according to Unipro.

Shampoos have become less dominant in the whole category compared to previous years, with a market value of €490m which represents a 0.4% dip on the previous year. The same can be said of post-shampoo treatments including masks and conditioners, down by 2.1% to €152m. Dyes and coloured mousses were also down, by 3.1% to total €242m. The biggest losses were recorded in the liquid gels category which slid down 4.5% on the previous year’s performance to total €71.96m. The other sector that suffered was fixers and mousses which lost around 6.2% to total €43.52m. Mass distribution, especially via supermarkets and hypermarkets, remained the preferred purchasing channel for Italians when it came to hair care and hair styling.

In terms of brands the Italian panorama didn’t change much from the previous year, with L’Oréal Italiana Saipo being once again the market leader, holding a 46% value share thanks to its numerous brands that target a variety of consumers and needs. The next most successful brand was P&G’s Pantene while Schwarzkopf & Henkel’s Gliss was also extremely popular among Italians in third.

In Italy recent fashion has dictated that voluminous hairstyles were the big thing, so many product launches were influenced by this trend. Pantene Pro-V launched the Corpo & Volume (body & volume) range featuring six new products from Corpo & Volume Shampoo, to the Corpo & Volume Balsamo conditioner and the Corpo & Volume Spuma Volumizzante Tenuta Extra Forte mousse (extra strong hold). Corpo & Volume Shampoo is said to remove all residue that can make the hair feel heavy. The range also features the Lacca Volumizzante (Tenuta Flessibile), the new Pantene hairspray said to give the final touch to a voluminous hairstyle. Last year Italian brand Cielo Alto (Soco) also focused on the trend for volume, bringing out products like the Gel Ecologico Volumizzante Effetto Bagnato in a new 150ml format. Cielo Alto also launched the Cielo Alto Ecologico Volumizzante Shampoo which is claimed to cleanse hair gently giving body and volume to even the finest hair.

Thin on top
In 2010 hair loss treatments were ironically one of the fastest growing categories in the Italian hair care market, recording a 7% growth in value terms while also performing very positively in volume terms. The increase in unit price stood at about 1% while the offer in this department was kept varied and innovative both for men and women. Vichy’s Dercos line (L’Oréal) features products dedicated to anti-dandruff, volumising, dermo-soothing, normalising and restructuring hair. In Italy the brand is best known for anti-hair loss treatments and products. Dercos shampoos are marketed as products that intensify the effects of the treatments while providing additional benefits. For instance the Shampoo Volumizzante Coadiuvante promises to give up to 34% volume to fine hair in three weeks. This is said to be the ideal accompaniment to the anti-aloppecia treatment Trattamento anti-caduta DERCOS Aminexil SP94 donna (for women). The shampoo features the active SP94, a molecule that according to Vichy is able to transform itself while in the hair root to recharge the hair with energy. Thanks to this process the molecule produces a dense and thick fibre that once released helps promote hair regrowth. The texture of the shampoo is purposely lightweight so that the hair does not become heavy.

Among the treatments to prevent alopecia, Dercos has also launched Dercos Aminactif Filler, claimed to repair hair and stimulate natural growth for women with long to medium length hair.

For best results, the company advice is to spray the treatment onto the scalp and then massage it through the full length of the hair while adding further product on the ends. Aminexil SP94 Donna for women meanwhile features polyphenols, described as antioxidants that protect hair from free radicals, and pro-keratin, a mix of amino acids known for their strengthening properties. More importantly the product features the patented molecule pro-keratin, a mix of amino acids known for their strengthening properties.
Another trend largely embraced by hair care products was anti-ageing, with many manufacturers last year focusing on treatments that promise to repair and regenerate hair that looks worn out. The Nivea Shampoo Intense Repair Capelli Stressati claims to do exactly that, featuring it, including Canadian-based Moroccanoil for the hair'. Kerastase Elixir Ultime works via a combination of argan oil, seed corn oil and pracaxi oil. This patented combination, called Tecnologia Kérastase Elixir Ultime Oleo-Complexe, is said to protect and repair hair both when applied before cleansing and used before styling, when it's said to leave hair soft and protected. The treatment can also be applied as a finishing touch, making hair extra supple and shiny.

Used for years by women in Morocco, argan oil has traditionally been considered a beauty treatment for hair, skin and nails. The Argan tree grows uniquely in the south west of Morocco in the province of Argan in the desert, where it produces luxurious fruits similar to olives but bigger and rounder. Argan oil is extracted from the almond-shaped stones that are inside the fruit, which revitalises and renews damaged hair.

According to the company they not only offer a quick solution for consumers who can’t be bothered to stick to a daily application routine but are also safer as possible negative effects of the product, such as skin reactions, can be sorted out immediately by removing the patch.

The attraction of argan oil
Argan oil was extremely popular last year in Italy with a number of brands putting out products that featured it, including Canadian-based Moroccanoil who developed an ultra light, non-greasy formula to ensure luminosity for all hair types giving hair a silky finish. The Moroccanoil treatment claims to restructure hair damaged by chemicals contained in shampoos and colouring products.

Meanwhile, Amargan Hair Therapy Oil also features an ultra lightweight formula said to be ideal for all hair types. Distributed only in professional salons, the product is said to increase hair drying time by up to 40% while also reducing split ends and fragile hair. Another benefit of this product is its ability to protect against both environmental and chemical polluting effects and it can be applied before or after styling.

Kérastase (L’Oréal) also made use of argan oil and maximised its properties by mixing it with another three oils. In October the company launched Kerastase Elixir Ultime that is inspired by ancient rituals and is said to be ‘an elixir of beauty for the hair’. Kerastase Elixir Ultime works via a combination of argan oil, seed corn oil and pracaxi oil. This patented combination, called Tecnologia Kérastase Elixir Ultime Oleo-Complexe, is said to protect and repair hair both when applied before cleansing and used before styling, when it’s said to leave hair soft and protected. The treatment can also be applied as a finishing touch, making hair extra supple and shiny.

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Aminexil 1.5% said to prevent hair from falling out. Dercos Aminactif is also available in pill form, as nutricosmetics have become increasingly associated with hair health.

Beside pills, anti-hair loss treatments also took other forms and shapes, including patches. At the end of October last year, Revlon Professional launched a new patch said to be the ultimate anti-hair loss treatment. Intragen 5 Patch, the new anti-hair loss treatment patches from the company are said to be an easy and handy solution for those who have a busy and frenetic lifestyle. They have been created to gradually release the active principles they contain so that they penetrate faster and for longer compared to traditional products. According to the company they not only offer a quick solution for consumers who can’t be bothered to stick to a daily application routine but are also safer as possible negative effects of the product, such as skin reactions, can be sorted out immediately by removing the patch.

Slowing the signs
Another trend largely embraced by hair care manufacturers last year was anti-ageing, with several brands putting out new products dedicated to keeping hair young and strong.

Redken Time Reset (L’Oréal) was greatly appreciated by Italian consumers with its products dedicated to hair weakened by the passing years. Products feature the line’s Vital 5 Complex, a combination of five components each said to take care of a particular sign of hair ageing. The patented Intra-Clayne formula is said to give equilibrium back to the outer layer of the hair; peptides and ceramides are claimed to reinforce the hair fibre while repairing weak or fragile ends; green tea is known for its action against free radicals due to its antioxidant properties; camellia oil is said to reinstitute natural hair wetness; and finally the cationic UV filter is used to protect against damaging environmental factors including UV rays.

In the mass market, Nivea (Beiersdorf) also tried to address the signs of ageing – those caused by stress in particular – offering two new products that promise to repair and regenerate hair that looks worn out. The Nivea Shampoo Intense Repair Capelli Stresstati claims to do exactly that, while the corresponding conditioner is also

### Italy: Hair care, market value, 2010, €m

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Source: Unipro

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available – Balsamo Intense Repair Capelli Stressati. The Biosoft System they both feature reportedly helps regenerate hair from within acting on the hair follicle and preventing the ends from splitting.

Salon selection
On 18 May this year, Unipro presented a new version of the cosmetics market report that it first introduced at Cosmoprof Bologna in April. Compiled through a series of interviews conducted with a sample of cosmetics companies and consumers, the new report is meant to give a more articulate view of the C&T industry in Italy and the hair care and salon sector takes centre stage in the updated report.

The report indicates that Italian hair salons haven’t yet recovered from the decline they underwent in 2008.

However, according to Monica Corti, brand manager for Everline (RCM Italia): “Salons, especially those of a certain level where bespoke services are given, have seen business slightly improve in the last year, up by 10%, and sales of salon hair care products have also increased consequently. However it remains difficult to make a prediction for the future given the economic instability and the trouble the salon segment went through recently.”

According to a spokesperson at Jean Louis David (JLD), one of the most popular salon chains and professional hair product manufacturers in Italy: “The market for hair care in general in 2010 has been characterised by a performance with ups and downs in which strategies had to be adapted within a short time. The main trend has been the number of visits consumers pay to salons, which we have seen continue throughout 2011, and consequently the contraction of services too.”

With regards to the salon business in particular, she says: “With a lot of satisfaction our company has been able to deal with the problems in the market. Even in this difficult year, our salons have been able to grow by 90% on 2009. There are different reasons for this including the fact that we have been a guarantee of quality for consumers for over 30 years and we also are innovative, bringing out new products every year.”

Hair care brands had to find their own way to deal with consumers’ diminished visits to the salon. JLD says it had two main ways of keeping aloft: “First we offer products that are suitable for all kinds of hair; second, we retrain our stylists every three months so that they increase their professionalism when presenting the benefits of our products to customers.”

JLD meanwhile says its most popular item in the past year was the Brush Cream in its Urban Style line, a product that makes brushing easier while providing shine to all hair types. It can be used every day to keep hair soft and shiny.

In 2010 the company launched the 100% Repair range, specific for sensitive and damaged hair and featuring vitamins A, C and E, said to nourish the heart of the hair fibre and prevent dehydration. Meanwhile the new line 100% Control was created for greasy scalps and dehydrated ends.

Despite the challenges it’s clear how manufacturers are really upping their offer in order to revitalise the professional hair care category in Italy, and with such variety available hopefully consumers will be a bit more daring in the coming months which will help the sector to flourish.

Safety first
In November last year Schwarzkopf & Henkel brought its new Essensity collection to market, claimed to provide ‘100% performance, 0% compromise’. The company aimed to offer consumers hair care and hair styling products that provide safe and effective formulas while being based exclusively on natural principles and enriched with pure biological essences. In its formulas, the company left out a long list of ‘baddies’ including artificial fragrances, silicones, parabens and mineral oils.

The Essensity range comes in four versions: Essensity Color, Essensity Moisture, Essensity Volume and Essensity Repair. And by December of last year the company had also put on the shelves the accompanying hair styling products in the Essensity line, also formulated with natural ingredients. Essensity Fixing Spray, Essensity Crema Volume and Essensity Siero Natural Shine are just three of the hair styling products that the company launched. Meanwhile, following the catwalk revival of curls and waves, Schwarzkopf launched the line Bc Curl Bounce, said to ‘provide 100% elastic curls after the first application’.

The formulation features nourishing ingredients like extract of cactus flower and the polymer polyquaternium 72. The new range features the Shampoo Bc Curl Bounce, Balsamo Bc Curl Bounce (conditioner), Lozione Energizzante Bc Curl Bounce (a conditioner in a spray format), Butter Treatment Bc Curl Bounce and Crema Ricci Bc Curl Bounce (an intensive cream).

Last year manufacturers in Italy continued to ride the natural hair care wave receiving a good response especially as many consumers have been very vocal about their doubts when it comes to using too many chemicals. Therefore this remains an area where real growth is still possible for the future and R&D into natural and organic hair care products might turn out to be the answer to reviving a segment that is currently pretty lacklustre in Italy.
While demand for FMCG goods seems to be slowly picking up in Spain, consumers are still tending towards lower priced goods as the difficult economic situation continues to be felt. This trend is echoed in sales for hair care products over the past year. Figures from Symphony IRI Spain reveal that sales of shampoos, conditioners, lotions, dyes and styling products fell by 3% to €748.6m in the year to 29 May 2011. Compared to the same period in the previous year, however, volume rose by 2% to 103.4m units. The biggest category in this sector, with an almost two fifths market share, is shampoo. Over the 52 week period, sales for shampoos fell in value terms by 3% to €289m, as volume increased by the same amount to just over 44m units. However, this volume growth took place in hypermarkets and supermarkets, according to Symphony IRI, where 3% more shampoo was bought than in the previous year. This suggests that Spaniards are opting to buy their shampoos with the weekly shop, rather than making a separate trip to the specialist perfumery or drugstore. These outlets reported a drop in sales volumes over the 12 month period.

According to research firm Kantar Worldpanel, the Spanish FMCG sector as a whole has picked up in recent months, although not sufficiently to offset the fall in sales at the start of the year.

Finding an alternative
While food sales have fallen, the picture for cosmetics is more positive but there is nonetheless a trend towards products that focus on price. “The factor with the most direct influence on FMCG markets is inflation,” says a spokesperson for Kantar Worldpanel. “Consumers respond to this not only by holding back on shopping, but also by opting for alternative, cheaper products such as those from outlets focused on discount or own label products.” In terms of volumes sold, private label is a significant player in hair care. In shampoos, it accounts for almost as much as the two leading companies, Procter & Gamble and L’Oréal, combined. In conditioners, almost one in every two sold is a private label item. In terms of sales value however, P&G and L’Oréal between them accounted for almost 60% of sales, or some €167.9m in the 12 months to the end of May. One example of a retailer seeking to take advantage of the move towards own label products is El Corte Inglés, with its Veckia line that launched earlier this year. The line includes shampoos suitable for all hair types among the 200 products available.

Within the hair care category, colouring and styling products account for some 41% of sales. Symphony IRI Spain figures reveal that the value of sales for hair colouring products has remained relatively flat at around €165m, while styling product sales dropped by 7% to €140.2m in the past year. The most popular styling product for Spaniards remains hairspray, which now accounts for 42% of sales in this category. Between 2010 and 2011, gel and mousse sales have shrunk so that they now represent a smaller share of a smaller category. According to STANPA, the Spanish National Association for Perfumes and Cosmetics, hair care accounts for around 23% of all cosmetics products sold in the country.

In this sub-category, Giorgi (Laboratorios Genesse) has recently revamped its range of gels, hairsprays and mousses. The new look range now includes the Control Total X-trema Gel that is said to be water and sweat-resistant, two sprays and a fixing mousse for curly hair. Multinational Salerm Cosmetics meanwhile has also introduced Hi Repair Hair Spray that it says repairs hair and protects it against the rays of the sun and uses the botoxplus system to repair damaged hair.

Spain: Hair care, market value and volume, 2010-2011*

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*52 weeks to 29 May
Source: Symphony IRI Spain

A colourful market
Among the hair colouring products to hit the market in the last year is the castaño claro (light auburn) product from Wella’s Kolestint line (P&G). This latest addition to the home hair colouring range is designed to last six weeks with the same intense colour. In a similar vein, John Frieda (Kao Brands) has launched Go Blonder Spray in its Sheer Blond range, which lightens hair in a less aggressive way than some other products by using a more acidic pH. It has

Gliss Ultimate Repair from Schwarzkopf offers the user a triple keratin complex to repair hair that is stressed and damaged.

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been developed for those two thirds of women with blonde hair who, according to Kao, desire to be even blonder. Nelly Color (Laboratorios Belloch) has also released a new bamboo-enriched range that has no ammonia and offers protection against the effects of the sun. “An unctuous gel, without ammonia and an easy application, strengthens the hair during colouring,” says the company.

And it’s not just women who are being targeted. L’Oréal has unveiled a new product for Spanish men, particularly those in their 30s and early 40s. While men are likely to be more reticent than women on colouring their hair, perhaps for fear that it will be too obvious or look unnatural, Excell 5 is a five minute treatment that helps to hide grey hairs without affecting the hair’s natural pigmentation. The cream does not contain ammonia and is available in six different colours ranging from dark brown to a dark shade of blonde. Another new product that is seeking to strengthen hair and reduce hair loss is Vitaforce (Llongueras). Containing extracts of hops and rosemary, Vitaforce is composed of a shampoo and a treatment that is said to reinforce hair by neutralising free radicals, stimulating circulation to boost the nutrients that get into cells, while the antibacterial properties of silicone extract reduce excess sebum in the scalp.

According to tests carried out on behalf of Llongueras by the Institute of Skin and Product Evaluation in Milan, using the product increases hair thickness by some 22% in both men and women. TRESemmé (Alberto Culver), meanwhile, has introduced a product onto the Spanish market that uses polymers, collagen and silk proteins for a big hair look all day long. 24 Hour Body is a complete range of shampoos and conditioners, as well as styling products that are designed to protect hair against humidity.

Protection and repair are also key features of a new range from Schwarzkopf & Henkel. Gliss Ultimate Repair introduces the new Liquid Hair Repair technology with a triple liquid keratin formula to repair damaged hair and is available in four references. Using the shampoo and conditioner together is said to reconstruct the hair and reduce hair breakage by 95%. The range also includes a mask and a treatment that is applied to dry or towel-dried hair without the need for rinsing. “Liquid Hair Repair is the ideal way to rescue extremely damaged hair, because the keratin modules have an identical structure to the hair and penetrate damaged areas to reach those that are most in need of repair,” says the company.

La Toja (Schwarzkopf & Henkel), meanwhile, has entered the hair care market with its Capilar SPA range that uses thermal minerals from the island of La Toja, off the north west coast of Spain. Three ranges of the La Toja hair care products, each consisting of shampoo, conditioner and mask, are now available: Hydra-Brillo for shine; Reparación for damaged hair; and Color for dyed hair.

Naturally does it

Natural ingredients are certainly important when it comes to hair care products in the Spanish market. The reformulated Herbal Essences range (P&G) uses water activated ingredients. When the products come into contact with water, the polymer and silk compounds they contain start to work on the hair to make it shiny and soft. The new formula is used across the seven Herbal Essences ranges. P&G has also introduced a new version of its Head & Shoulders anti-dandruff shampoo for women. Launched in time for the summer season, the four products in the range are said to work on any damage caused to the hair and scalp caused by the sun, sea and chlorinated water.

Fructis (Garnier) has also introduced an anti-dandruff range, while Pantene (P&G) has brought two new lines onto the market – one for dyed hair and another that is inspired by popular spa treatments.

On a final note, the Aussie hair care range is set to arrive in Spain this autumn. P&G is bringing five lines to complement the core 3 Minute Miracle Conditioner. Three different ranges will be available: Miracle Hydration, Frizz Miracle and Colour Miracle. Based on natural ingredients, these products seem set to fit in well with the Spanish market for hair care and underline manufacturers’ commitment to new brands, as well as investment in the existing product offering. The continued investment would suggest that the brands are looking to be in a strong position as the economy starts to pick up and perhaps they will be able to lure some consumers back from own label products.
The UK hair care and styling markets continued their run of positive growth with a 5.3% boost in sales in 2010, reaching a total of £1.16bn. Volume growth was more subdued however, slipping 1.5% to total 509.489m units. Consumers trading up to more premium brands and the continued growth in larger bottle sizes, driven by consumers’ continued search for greater value for money, may have impacted growth here.

Of the individual hair care categories, shampoo remained the largest, maintaining its 32% market share and growing 4.9% year-on-year. Hair colourants, which command a 23.3% market share, grew 11%. The conditioners market remained steady at 21.7%, growing 1.2%, while women’s hairsprays grew 10.5% to take an almost 10% market share. The male and female styling category stalled however, growing just 0.8% to take 13.8% total market share.

Following a drop off in salon visits 12 months ago, the professional market appears to have rallied too. “The salon market definitely seems to be in healthy growth at the moment and salons that offer a unique experience and strong customer service are continuing to grow despite the recession,” says Claire Linney, marketing manager, Aveda UK & Ireland. “We have seen steady growth in the number of visits each guest makes to the salon and in sales as guests recognise the value of professional products and well-being.”

Demand for treatments in the salon is evolving too, according to Linney. “The Aveda Institute in Covent Garden has seen a big resurgence in customers wanting their hair done – up dos and big blow drys for the weekend or a night out,” she explains.

Home comforts
And as consumers have become more experimental with their hair care and styling routines, brands have come to their aid with a slew of new launches. Product development has been fast and furious over the last 12 months, with even greater segmentation in the product offer. An interesting trend has been the number of launches offering results claimed to recreate salon treatments for home use.

Charles Worthington (PZ Cussons) has taken inspiration from Brazilian hair straightening procedures available in salons to launch the Salon At Home Straight & Smooth kit, a semi-permanent at home straightening treatment, which claims to leave hair straighter and smoother for up to 40 days. The system contains cysteamine, an active ingredient that relaxes curls and waves, ‘re-programming’ the bonds in the hair and preventing any frizz or curl even in humid conditions and reducing the need for hair drying or straightening to keep hair sleek and straight. Argan oil, antioxidant vitamin E and nourishing proteins help keep hair smooth, soft and manageable, says the brand.
Similarly, Kao Brands’ John Frieda launched Frizz-Ease 3-day Straight which is claimed to be a safer alternative to permanent hair straightening procedures and provides a semi-permanent styling action that lasts for up to three days and against eight hours’ worth of humidity. According to the company, women with frizzy hair can spend up to 104 hours a year styling their hair straight but it usually starts to curl and frizz again in just a few hours. The product features keratin and a heat activated polymer technology.

Kerry Warn, international creative consultant for John Frieda, says: “Women with frizzy hair work hard to keep their hair straight, smooth and frizz-free but frustratingly those perfect results never last for more than a few hours and all that effort goes to waste. With Frizz-Ease 3-day Straight Styling Spray the hair is easy to style and it remains smooth and straight for longer – a dream come true for so many women.”

The brand has also addressed the problem of root touch ups. Sheer Blonde Go Blonder Controlled Lightening Spray is said to be perfect for blending the roots between salon visits. Like the Frizz-Ease 3-day Straight Styling Spray, John Frieda Sheer Blonde Go Blonder Controlled Lightening Spray is heat activated and for best results should be used with a hair straightener or curling tongs after blow drying, according to the company.

Lastly the brand has launched Luxurious Volume Anytime Refresher Spray, which provides on-the-go hair freshness and volume without the need to wash hair.

Dry spell
Dry shampoos have seen a huge jump in sales in 2010 – according to Kantar Worldpanel sales jumped an astonishing 136.3% year-on-year to reach £3.6m, as this relatively small sector enters the mainstream. Breaking the shampoo sector down further, conventional shampoos grew 3% to reach £82.7m in sales, while 2-in-1 products jumped an astonishing 136.3% year-on-year to £3.6m, as this relatively small sector enters the mainstream. Breaking the shampoo sector down further, conventional shampoos grew 3% to reach £82.7m in sales, while 2-in-1 products managed just a 1% growth to £13.7m.

Linney notes that less than 50% of UK women use a shampoo daily, creating even more potential for this burgeoning sector.

“Women often have twice as many bottles in the bathroom as they currently use and on average will use a treatment once a week and styling products twice a week,” she adds.

Luigi Murru, global creative consultant for John Frieda, says that dry shampoos have become so popular because they “give such instant results and absorb oils so the hair looks fresh”.

Keeping hair fresh has been a key marketing message with dry shampoos – Batiste (Vivalis) for instance now boasts ten fragrances in its relaunched ten-sku line-up, while Superdrug (AS Watson) has introduced three additions to its collection including two new fragrances and a version for brunettes.

As with elsewhere in the maturing hair market, the dry shampoo sector has begun to segment, with variants created for specific hair care concerns. Batiste's latest addition, XXL Volume promises to boost volume, as well as enhancing the appearance of hairstyles.

Product development has also been healthy in the conditioner market, with intensive conditioning treatments (up 1.8% to £14.1m, according to Kantar) showing potential for growth as mass market brands introduce ‘add on’ products to existing lines. L’Oréal Paris (L’Oréal) introduced Full Restore 5 60 Second Saviour to its Elvive line, which promises to replenish weak, limp and damaged hair thanks to a formula enriched with pro-keratin and ceramide that provides the conditioning intensity of a treatment but with the speed of a regular conditioner.

Similarly, Pantene’s (P&G) Colour Protect Colour Seal Concentrate is claimed to help repair the signs of damage associated with coloured hair, whilst protecting colour for up to eight weeks.

Colour confidence
The home hair colour market was given a real boost thanks to a slew of new launches that focused on texture and ease of use for the consumer.

John Frieda has entered the home hair colourant sector with a market first, Precision Foam Colour. The new at home colourant is said to be the first at home permanent foam hair colour on the market and promises a salon result with virtually no dripping or mess. The foam is easy to use as regular shampoo, according to the brand, and spreads to cover hard to reach areas, ensuring an even colour and 100% grey coverage. In addition to the hair colour, which comprises a developer, colourant and foamer that on contact produce the foam, a Colour Keep Conditioner helps lock in colour and protect the hair, creating long lasting results and vibrant shine.

Schwarzkopf & Henkel and L’Oréal followed hot on Kao’s heels with their versions of foam hair colourants, while Superdrug has launched Precision Sensations, its seven colour, own brand alternative which has been priced competitively to compete with existing lines on the market.

The foam format has also been picked up by Regain for Men (McNeil Healthcare) which launched Regaine Extra Strength Foam, a hair loss treatment which is claimed to prevent further hair loss and promote growth when used twice a day for eight weeks.

Segmentation success
The increasing existence of anti-hair loss products on retailers’ shelves is further evidence of the diversification in the hair care market in the UK. Once only available by prescription, medical related hair concerns have been adopted by beauty brands and variants have been launched.
According to Nanogen, hair loss affects about 20% of women in the UK with up to 40% admitting to noticeably thinning hair by the age of 50. The anti-hair loss range, which consists of products to cleanse, thicken, stimulate hair growth and conceal bald patches, recently launched in Boots, bringing a range that was previously only available in professional outlets to the mass market.

Similarly, AGE beautiful (Zotos/Shiseido), available exclusively at Sally professional stores, claims to address problems associated with ageing such as thinning hair, wavy greyness, colour loss and dullness. The range includes Fullness & Body Shampoo and Conditioner, Fullness & Body Bodifying Spray, Softness & Control Styling Crème and Intense Strengthening Treatment.

Elsewhere professional hair care line Goldwell (Kao Brands), introduced its Anti-Hairloss Spray, claimed to help prevent hereditary hair loss, as well as Dualsenses Scalp Specialist, a six-sku range created for problematic scalp conditions, including Sensitive Foam Shampoo, Sensitive Soothing Lotion and Anti-Dandruff Shampoo.

“What consumers are looking for in hair care is more specific products that are tailored to their needs and perform strongly,” explains Linney.

UV protection claims have been popular with many brands. Clynol (Schwarzkopf & Henkel) reformulated its Sun range, which comprises a hair & body shampoo, after sun conditioner and intense hair mask to counteract the damaging effects of the sun, salt water and chlorine.

And Charles Worthington’s new Sunshine range contains antioxidant white tea and rice protein to nourish hair, helping to protect against harmful UV rays and prevent hair drying out. The line includes a shampoo, conditioner and protection spray. Vo5 (Unilever) meanwhile has relaunched its Anti-Hairloss range containing Adaptative Haircare technology, which is said to adjust to provide the amount of nourishment hair needs; while Morroccanoil has addressed flat, limp hair with Extra Volume Shampoo and Conditioner, a volumising duo that helps protect and nourish hair, leaving it shiny and manageable.

Volume has also been a focus of celebrity hairstylist Guy Kremer whose newly launched Professional Salon Style line includes Add the Volume Cleanser and Rebalancer shampoo and conditioner, which has been developed to restore fullness and body to fine, fragile hair.

Tesco’s new hair care range, My Senses, includes a volumising variant. Heavenly Body, one of four lines in the range, contains tia flower and plum extracts, which are said to bring body back to fine hair. And for frizzy hair, La Biosthetique launched Antifrizz, a collection comprising shampoo, styling balm, conditioner and serum that is said to target frizzy hair leaving it shinier, silkier and full of body, with a 48 hour guarantee.

The new elixir

Hair care and styling products containing argan oil have become increasingly popular in the last couple of years – success stories such as Moroccanoil and Ojon (Estée Lauder) have made hair oils one of the biggest trends in beauty in the past year with brands in both the premium and mass ends of the market launching variants.

Dove (Unilever) has introduced Nourishing Oil Care, a range of products designed to revive rough, dry and frizzy hair. The products, which include a shampoo, conditioner and express treatment conditioner, contain a Weightless Nutri-Oils Technology, a blend of natural almond and coconut oils that are claimed to penetrate rapidly to replenish hair from within.

“And in three women in the UK consider their hair to be dry or normal to dry,” explains Dove hair brand manager, Sandra Ferreira. “The Dove Nourishing Oil Care range has been developed to rescue hair that has been damaged through styling and environmental factors.”

On the professional hair care market, Kerastase (L’Oréal) launched Elixir Ultime, a nourishing hair oil containing a blend of maize, argan, camellia and pracaxi oils, while L’Oréal Professional’s Mythic Oil is said to have a lightweight formula, making it suitable for finer hair. Similarly, Morroccanoil launched a light variant of its iconic treatment oil, said to be suitable for blonde or fine hair, following the popularity of the original product.

Sally Beauty introduced Argan Secret Oil, a range of hair care products infused with argan oil, said to smooth and transform frizzy hair. The range includes a treatment oil, shampoo, conditioner and conditioning treatment.

And Ojon has developed Instant Restorative Hair Serum containing rouge oleifera oil, which is found in the fruit that surrounds the ojon nut. This combined with the ojon oil is said to provide an instant solution to fine, dry and flyaway hair, and can be used on damp hair for its protective qualities, or on dry hair as a finishing product.

The popularity of oils also fits in well with the naturals trend, which has seen more subdued product development in the past year. Redken (L’Oréal) launched its first natural hair care range, Nature’s Rescue, claimed to be free from parabens, sulphates and silicones, and utilising plant and marine extracts to remove impurities and build-up in the hair.

The range includes Refreshing Detox Shampoo with aloe vera and soy proteins; Cooling Deep Conditioner containing aloe vera and sea algae; and Radiant Sea Spray, a hair perfume that adds texture and movement, according the brand.

Marine ingredients have also been a focus for La Biosthetique, which launched Bleu de la Biosthetique, a hair and body range containing amino acids and minerals derived from brown and micro algae and said to leave hair cleansed, soft and manageable.

Natural body care brand Naked (KMI) moved into hair care meanwhile, with the launch of a new line, which includes shampoos and conditioners as well as Divine Carls Serum and Miracle Worker Leave-in Conditioner. All products are said to be paraben-free and use natural ingredients.
Talking texture
According to Kantar Worldpanel, just 39% of women and 18% of men use a hair styling product with an average frequency of four days a week. The main reason for use is cited as holding a style with hair sprays remaining the most popular format (28%), followed by gels (20%) and mousses (12%). Women's hairsprays in particular have seen considerable growth in the past year, up 10.8% to €41.7m.

Product development in the styling market has been characterised by texture. The poker straight trend so popular with men and women's styles over the last few years in the UK has been replaced by a more natural appearance with a focus on movement and waves.

Aveda's (Estée Lauder) Be Curly Style-Prep promises to define curls and control frizz, ensuring curls stay in place for longer, whilst providing moisture and shine. Similarly, Schwarzkopf & Henkel's recently relaunched Osis range includes several products that are claimed to provide movement, body and curl. Pump My Curls is the brand's first pump spray which transforms into a workable cream that defines curl and leaves hair soft. Curl Me Soft meanwhile is a rich cream that adds bounce and curl definition without stiffness or stickiness, and Body Me is a serum that promises 100% more volume, leaving hair looking fuller with natural movement.

Texture has been a key focus for Bumble and bumble as well. Its new Texture hair (un)dressing crème provides volume, texture and lift to leave hair looking ‘mess up’. And La Biosthetique has drawn inspiration from the popularity of sea salt sprays to launch Beach Effect Styling Spray. The spray provides UV protection and moisture, whilst leaving hair texturised with a natural silky matte finish.

Men's styling has also seen an increase in the number of products offering long-term hold. L'Oréal's Studio Line brand has introduced Spike Fanatic, which promises up to 24 hours of hold for spiky styles, while fellow L'Oréal band Garnier has added Style Survivor Gel to its Fructis hair range. The gel, which is claimed to be the strongest hold product in the Fructis line, contains cactus extract to help provide hold in extreme conditions such as heat, humidity and wind, with no sticky residue.

The UK market had been full of innovation and creative thinking in the past year and the hair care and styling markets have been awash with new formulas, textures, ingredients and formats to ensure that this category remains one of the country's frontrunners for some time to come.

The market for hair care products (shampoos, conditioners, styling aids and colour products) is a double edged sword here in the US. On the one hand, the professional category is still suffering through the effects of the recession and as a result consumers are going longer between their cut and colour appointments. Yet the consumer's reluctance to spend has created new opportunities for mass market players, who are rolling out a wide array of products for people with upmarket tastes but low budget incomes.

According to the Symphony IRI Group, sales of shampoos in food, drug and mass merchandisers rose by less than 1% last year to more than $1.3bn. P&G’s Head & Shoulders Classic Clean Dandruff Shampoo was the number one brand in the US last year, with sales in excess of $38.3m while sales of conditioners and crème rinses were flat at $912m. More consumers expect tailored solutions to their hair care problems even at mass market level.

For the green thinking US consumer, L’Oréal’s Garnier Fructis Pure Clean shampoo and conditioner are now available in a 92% biodegradable format. According to the company, the products contain no silicones, parabens or dyes. The brand’s ‘Ultra-Clean’ system, with the power of the antioxidant acerola berry, boosts the health of hair while leaving no heavy residue behind, according to the company.

The dandruff battle
A few months ago, L’Oréal launched Garnier Fructis Anti-Dandruff to take on Head & Shoulders, a franchise that commands the lion’s share of the $271.7m mass market dandruff shampoo category, according to the Symphony IRI Group. Garnier Fructis’ Anti-Dandruff provides 48 hour dandruff control via natural extracts that purify the hair and scalp for a deep clean and vitamin B that strengthens hair. There
are four different products, including Garnier Fructis Anti-Dandruff Intense Cleanse, a shampoo that contains microbeads to scrub the hair and scalp for a long-lasting, deep clean. For those seeking sleek hair, P&G has introduced the Split End Repair Crème to the Pantene Medium-Thick Hair Solutions range in July. The keratin protection crème helps repair split ends and protects against future damage. Similarly, Unilever rolled out a new Dove Daily Treatment Conditioner and a new Dove Intensive Repair Shampoo and Conditioner System. All contain Fibre Active technology that works to penetrate deep inside the hair strand to help rebind damaged proteins and a patented micro moisture serum which helps repair the surface of the hair by sealing lifted cuticles to help protect against future damage. The serum targets damaged hair by depositing conditioning, cationic polymers and fine silicone droplets in an even layer, leaving hair with a more conditioned, clean feel without weighing it down, according to the company.

**Retail partners**

While P&G, L’Oréal and Unilever slug it out at the top of the mass market, smaller players are finding some room of their own on store shelves. SheaMoisture has partnered with drug store retailer Walgreens to launch a line of hair care products. The SheaMoisture hair care line – comprising shampooos, conditioners and styling aids – is rolling out at more than 7,000 Walgreens stores and online via the retailer’s website.

“We are very excited to launch our newest collection at Walgreens,” says Richelieu Dennis, founder and ceo of Sundial Creations which manufactures SheaMoisture. “They have been a key partner in the growth of our business and we are enthusiastic about bringing organic hair care products to such a broad consumer base.”

The range is available in four varieties: Raw Shea & Argan Oil, Coconut & Hibiscus, Yucca & Baobab and African Black Soap. The launch also includes two new hair kits: the Curl & Shine Kit and the Repair & Transition Kit, which contain travel sized versions of the Coconut & Hibiscus and Raw Shea hair collections.

“A colour specific roll-out has come from Scruples, the US salon hair care company. Scruples PearlScritpives Platinum Shine Brightening Shampoo maintains blonde and grey hair with a violet colourant that neutralises unwanted yellow tones. The sulphate-free formula is enriched with chamomile extract to restore shine and enhance light hair; sea kelp extract; and the brand’s Protective Barrier Complex (PBC), an essential blend of ingredients designed to condition and protect hair against environmental damage.

Crème of Nature (Colomer) has expanded its line of products with certified organic argan oil from Morocco with five new products including the Crème of Nature with Argan Oil Treatment, Moisture & Shine Shampoo, Intensive Conditioning Treatment, Strength & Shine Leave-In Conditioner and Oil Moisturiser. The restorative Moisture & Shine Shampoo is sulphate-free and delivers intense shine while it gently cleanses the hair.

**In style**

Despite the plethora of hairstyles out there, sales of hair styling products haven’t moved much during the past year. In 2010, sales of hairsprays and spritzes rose by 1.2% to $412.4m, while sales of gels and moustes were flat at $632.4m in US supermarkets, drugstores and mass merchandisers (excluding Walmart), according to the Symphony IRI Group.

Suave is rolling out the red carpet for the new Suave Professionals styling line, said to work as well as salon brands, according to the company. The reformulated and redesigned range features everything from an anti-frizz serum to a heat protection spray. Meanwhile, VO5’s new Perfect Hold Styling Line, in four different applications, is formulated with a unique polymer blend that assures all day hold with a lightweight feel. The collection features everything from hairspray to mousse. Unilever recently completed its acquisition of Alberto Culver, but US authorities only approved this on the condition that Unilever sell the Alberto VO5 brand in the US and divest its Rave brand.

In other Unilever news, Body by Blow mousse is designed to provide style and control without the tackiness of a traditional mousse. The rich whipped foam texture offers hair hold without residue or crunchiness, according to the company.

Meanwhile, a big launch in the men’s category this season is Axe’s newest styling innovation, Axe Buzzed Look Cream + SPF15. It is the brand’s first and only product with SPF protection which shields the scalp from UV rays.

**Waxing and waning**

According to Mike Gilman, founder of the Grooming Lounge in Washington, a service for men’s grooming products and services, waxes and pomades seem to be increasingly popular this year.

“Waxes are easy to use and great for both conservative or more textured, tousled looks,” comments Gilman. “Pomades are also very popular for guys who have a style with a bit more length. They have appropriate hold with a high shine, so it’s great for anyone that’s seeking either a conservative, parted look or a slicked-back style. Guys also like that pomades are very easy to use and can be used on both towel dried or dry hair.”

Hair styling products are also using innovative applicators this year in the US. For example, the brush-on Volumising Dry Shampoo Lift Powder from Keratin Complex provides an instant hair transformation, according to the company. This portable powder instantly refreshes and adds volume to even the most lifeless tresses.

Volume and shine are obviously key words when it comes to the hair care category. The hair care brands that can deliver these benefits are sure to succeed no matter how long it takes the US economy to start growing again.
The market for hair care and styling products is progressing dynamically in Russia. Hairstyles are becoming ever more ‘natural’ requiring new products with light textures which combine the properties of hair care and styling to create a look which appears to involve little product.

The styling market is varied and today Russia enjoys an attractive variety of brands. According to the survey of the Target Group Index Russia, Synovate Comcon in 2010, 20% of the population of Russian cities with a population over 100,000 people aged 16+ use styling products on their hair. The majority of customers still prefer the traditional hair styling products. In fact, 14.4% of respondents used lacquers or hairsprays on their hair while 13.3% preferred foam masks or mousses for hair setting purposes.

Who’s who
Traditionally, the leading hair care and styling manufacturers are international ones but among Russian manufacturers, the Arnest Group of Companies is ahead of the others.

Arnest has the complete manufacturing cycle, from the development of products and the manufacturing of components to actual sales and brand promotion. One of Arnest’s most popular brands is Prelest which sells well with consumers in Russia.

South Korean company, Sewha P&C Inc, which is promoting the premium product range VonU, is a new player in the Russian market. The VonU brand is represented both in well known Moscow retail chains, such as Flirtshop, Elize and Arbor-Mundi, as well as in regional ones. The unique composition of VonU hair care products is based on nano-platinum and extracts of rare medicinal plants.

A major Russian manufacturer, ESTEL Professional, has introduced a new range of Airex hair products onto the market which have been developed for professional use – these include a curling mousse, hair lacquer, thermo protection spray, hair setting milk, modelling hair cream, hair gel, elastic gel for modelling, modelling wax, opalescent modelling gum and stretch-gel.

It is worth noting that all products have various fixation degrees. For example, a lacquer can be flexible or elastic, whereby a milk product would render a normal degree of fixation. These products contain vitamin B5, silk proteins, active moisturising components, a complex of micro polymers and UV filters.

The attraction of Arnest
Arnest has been successfully promoting its Prelest and Prelest Professional brands recently and the hairsprays in the range are among the most popular products sold. A new styling line from the company by the name of Memory Effect comprises mousse and hair lacquer. Natural bamboo extract and vitamin B5 in the formula enhance hair elasticity and add moisture at the same time. The spray/liquid also uses almond extract for extra softening properties while a special thermo protection complex guards the hair from the aggressive impact of high temperatures which can be caused by over styling.

Arnest has also introduced the Stylissa line onto the market – an array of luxury styling aids from the French L’Arnée Cosmetics brands. Pearl extract and French rose oil in the formula saturate the hair with essential micro elements filling it with shine and health.

Wella Professional’s (P&G) High Hair line of products enables customers to choose from a variety of caring and styling products. The Milk Style Foundation effectively preserves the colour of tinted hair; the Styling Mousse creates volume and flexibility in thin hair; the Curl Artist is essential for frizzy hair; while the general purpose lotion Crystal Styler is an all round product for all hair styling needs. The unbeatable best seller for the company is High Hair Finishing Spray, which will fix the style and ensure UV protection for the hair as well as offering an anti-static effect.

Distribution channels
In order to develop a successful regional distribution network, a hair care company must have a well developed chain from the manufacturer to the consumer comprising warehouses, training studios, training managers for workshops and sales managers for distribution purposes.

In order to expand its distribution channels in Russia, Paul Mitchell offers an attractive starting package for beauty salons promoting its brand. The results are encouraging as after eight years’ presence in the Russian market the company has attracted some 20 regional partners and approximately 1,000 affiliated beauty shops.

The salons offering these products regularly provide discounts to their customers for their favorite procedures and offer products specifically for home use if that is what they prefer.

When it comes to hair care and styling, the Russian market is growing and gaining in sophistication all the time. With both manufacturers and retailers on board with making this an ever more important C&T category in the country, and one with much potential, the future for all involved looks good.