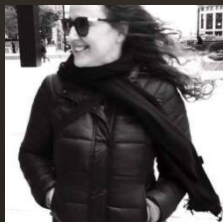


Hair Care Trends in Europe

July 2019



Mônica Simão
Client success team – Latin America

Mintel Services



Macro-Environmental Trends

Mintel Trends



Consumer Needs

Mintel Reports



Market Sizing

Mintel Market Sizes



Category and Product

Mintel GNPD

Mintel Platforms

give you access to Mintel's entire portfolio of market intelligence for each industry:

Beauty & Personal Care



Food & Drink



Household & Personal Care



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CONSULTING

A fresh customized viewpoint supported by rigorous data on brand, innovation, strategy and consumer insight.



FIELD SERVICES

On-the-ground intelligence and product retrieval you need to inform your sales strategies and monitor those of your competitors.



OBJECTIVE & METHODOLOGY



Objective:

The Mintel Client Services team have put together this presentation considering the latest trends in Beauty Care in Europe, focusing on Hair Care to give **PromPerú** team some insights on how to better explore Peruvian ingredients in the Hair Care segment

Methodology:

The following Mintel tools were used:

- GNPD
 - Launches, Charts, Innovative Products, Topical Insights, Price positioning
- Trends
 - Observations in Europe concerning natural ingredients
 - As courtesy, some information from Mintel Platform tools (signalized in orange)

Agenda



Global Hair Care
Market figures



European Beauty
Market



Key Hair Care Trends
in Europe



Final Considerations

Global Hair Care Market Figures

Key data



Global opportunities

1

Develop newer segments and engaging concepts

Innovations trying to stand out in a saturated haircare market include overnight treatments, UV protection formulas and sensorial concepts using colour or sound (eg fizz). Pre-wash innovations, from scalp exfoliators to pre-shampoos, can expand and appeal to those most engaged in hair cleansing and who shampoo twice in the same wash.

2

Focus on convenience and customisation

Bring greater convenience to dry shampoo with more portable compacts and sheets formats and compete with dry shampoo alternatives (eg revitaliser spray and quick rinse 'cleansing water'). Multipurpose NPD also saves time and storage space, and we've seen hybrid dry shampoo/styling paste, 3-in-1 treatment, hair styler and hand cream.

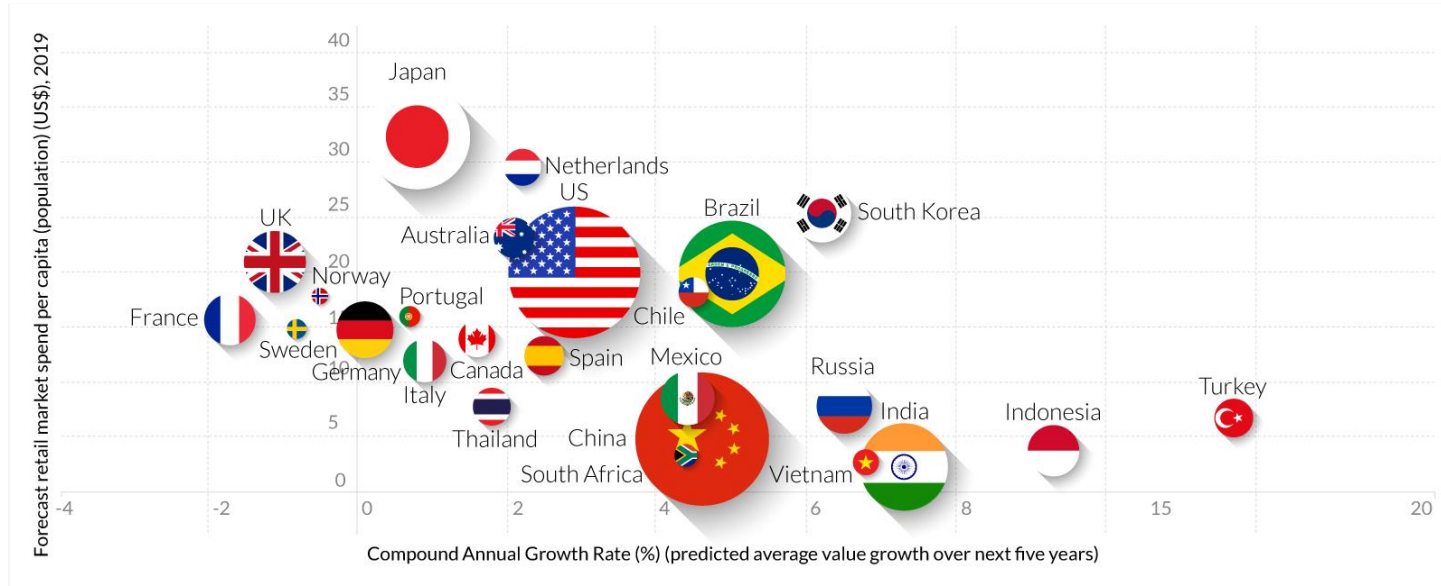
3

Category blurring and eco opportunities exist

Embrace the eco/natural movement and **stress water-saving and plastic waste minimising benefits. Solid formats** bode well in this space. Convey naturalness by **blurring with food-based staples** (eg cider vinegar) or be more disruptive and offer **inside-out haircare solutions to eat, drink or apply to the hair/scalp.**

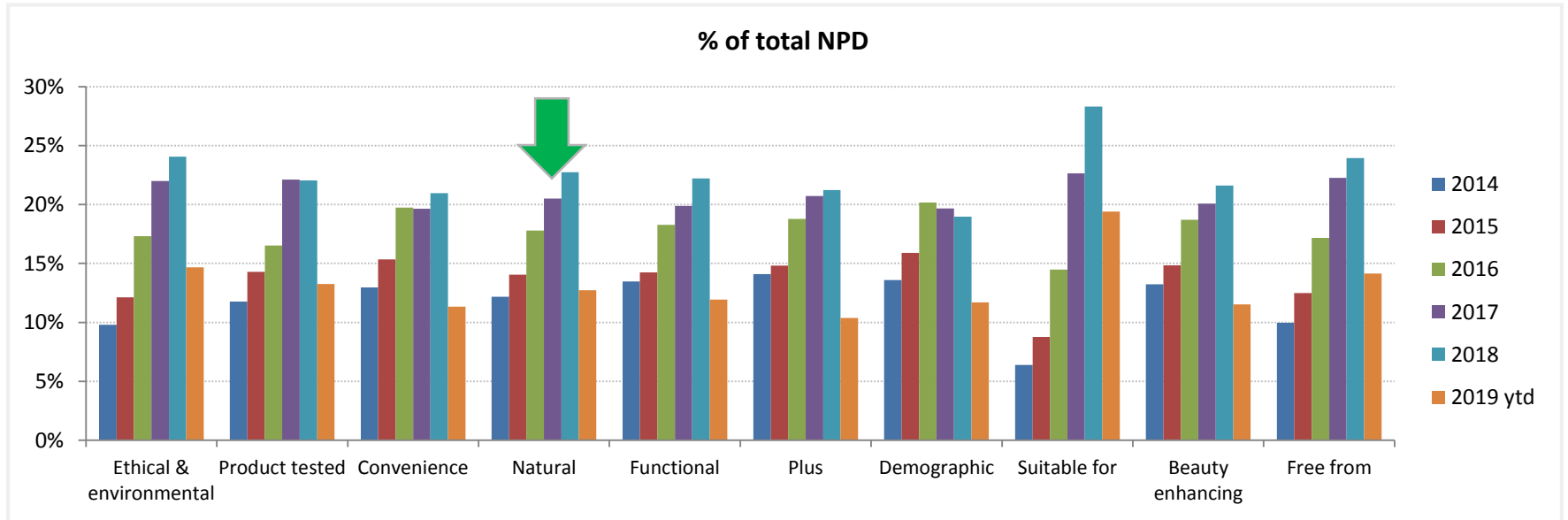
Global retail market overview: haircare 2019

Growth markets: Brazil and Chile, with above-average CAGR and spend per capita; Russia, Turkey and Indonesia, with highest CAGR. **Slowing markets** include Japan and the UK.



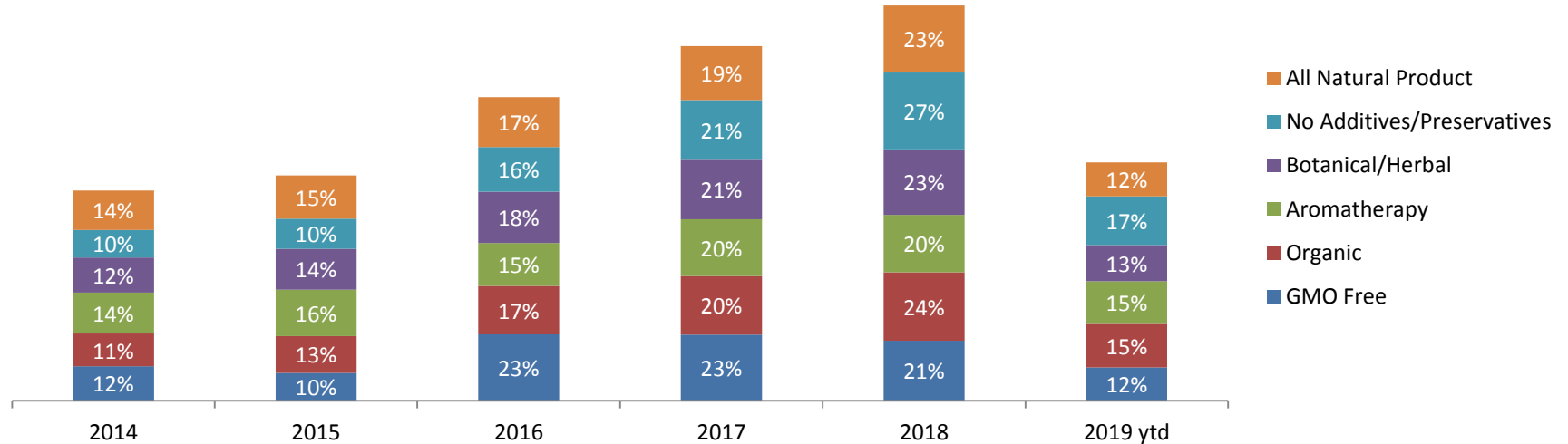
Global: Hair Care top claims over the last 5 years

Global: launches of shampoo, conditioner & hair treatments, % by leading claims, 2014-19



The evolution of “natural” in Hair Care

% of claims in Shampoos, Conditioners and Treatment products



A woman's profile is shown in a three-quarter view, facing right. She has a large, voluminous white feathered hairpiece on top of her head, secured with a gold-colored hairband. Her face is adorned with dramatic, iridescent pink and purple makeup around her eyes and forehead. The background is a plain, light gray.

European Beauty Market

Learning from other categories

Mintel Trend: Playing Mother Nature



With evolving demands and changing climates, our approach to natural and sustainable ingredients must change. In order to meet consumers' growing demand for pure and efficacious products, a dependence on science and technology will be essential for the future of beauty products. A move to become more 'local' in terms of ingredient sources and wisdom will create opportunities for people to protect and preserve resources from their local environment. Locally-sourced and produced products can help reduce overall carbon footprint – a key focus for more and more consumers.

Why consumers will buy into this

Naturals are on the rise

Naturals are increasingly popular with consumers as they are perceived as purer and safer, and people are also becoming **more concerned about their carbon footprint and impact on the environment around them**. Being viewed as 'green' has become a trend, and for some, a lifestyle choice.

Consumers are better informed

People are doing more research and reading than ever before, so they are more in tune with developments in science and technology. Smartphone apps can provide consumers with **insights into the safety of products and the source of ingredients**. Certifications are also on the rise.

It focuses on local pride

Many consumers want to 'get back to their roots' and that extends to products and services. Shopping small is a trend and **locally-sourced/produced and small batch goods** appeal to those who want products to reflect where they live. This instills pride and a sense of guardianship.

Consumers believe natural is best

More people seek beauty products that are derived from nature.

IN THE UK

30%

of consumers who use a product on their body said that natural ingredients are one of the most important features in a bodycare product

IN SPAIN

64%

of consumers look for products made with natural ingredients. This number rises to 67% among senior consumers (+55 y.o.) and 66% among consumers aged 25-34 y.o.

IN GERMANY

56%

of consumers look for products made with natural ingredients

Base: 1,697 internet users aged 16+ who use products on their hands/body/feet (Jan2019); 949 Spanish internet users aged 16+ who have bought beauty products in the last 12 months (Oct2018); 951 German internet users aged 16+ who have bought beauty products in the last 12 months

Source: Lightspeed/Mintel



Read on [mintel.com](https://www.mintel.com)

The foodie trend you need to know about

Nutrient-dense food ingredients in Beauty products may resonate with young Millennial women in Europe and America, and can also add organic and vegan labels.

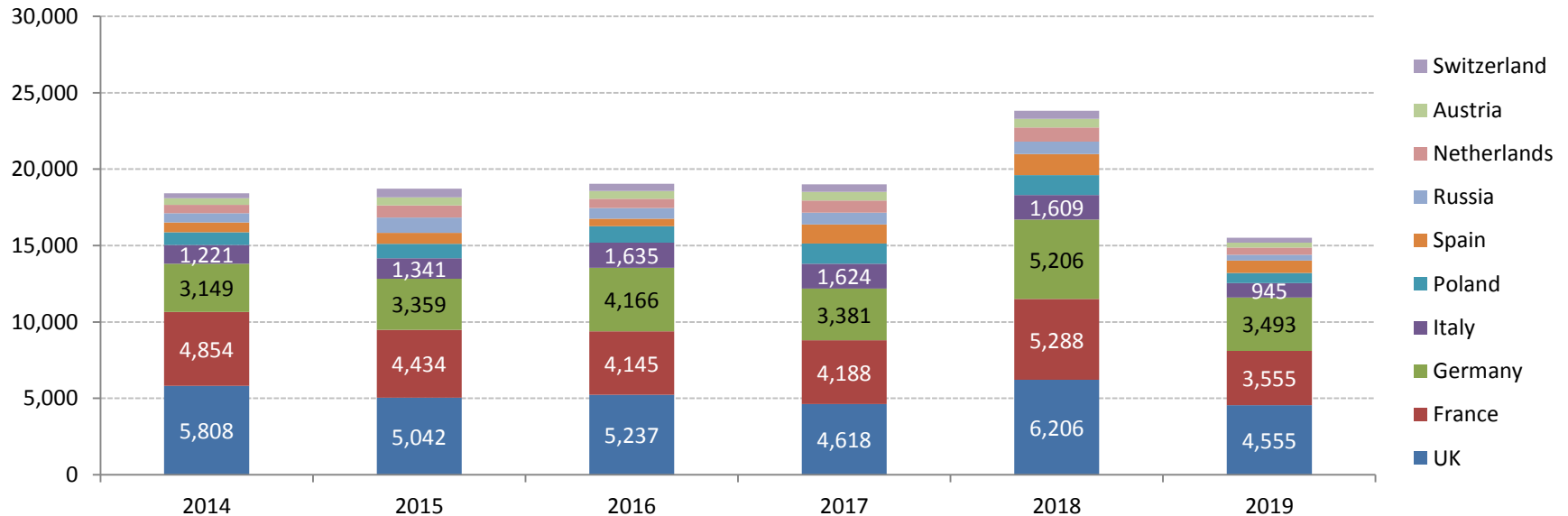
The possibilities of using **vividly-coloured**, nutrient-dense vegetables and fruit is also highlighted by brands such as [Skinfood](#).

Personal Care products could follow the Asian trends for using colourful foods for optimum health, with green, red, purple and black foods all perfect for the outside-in beauty that will appeal to young females in Europe and America.

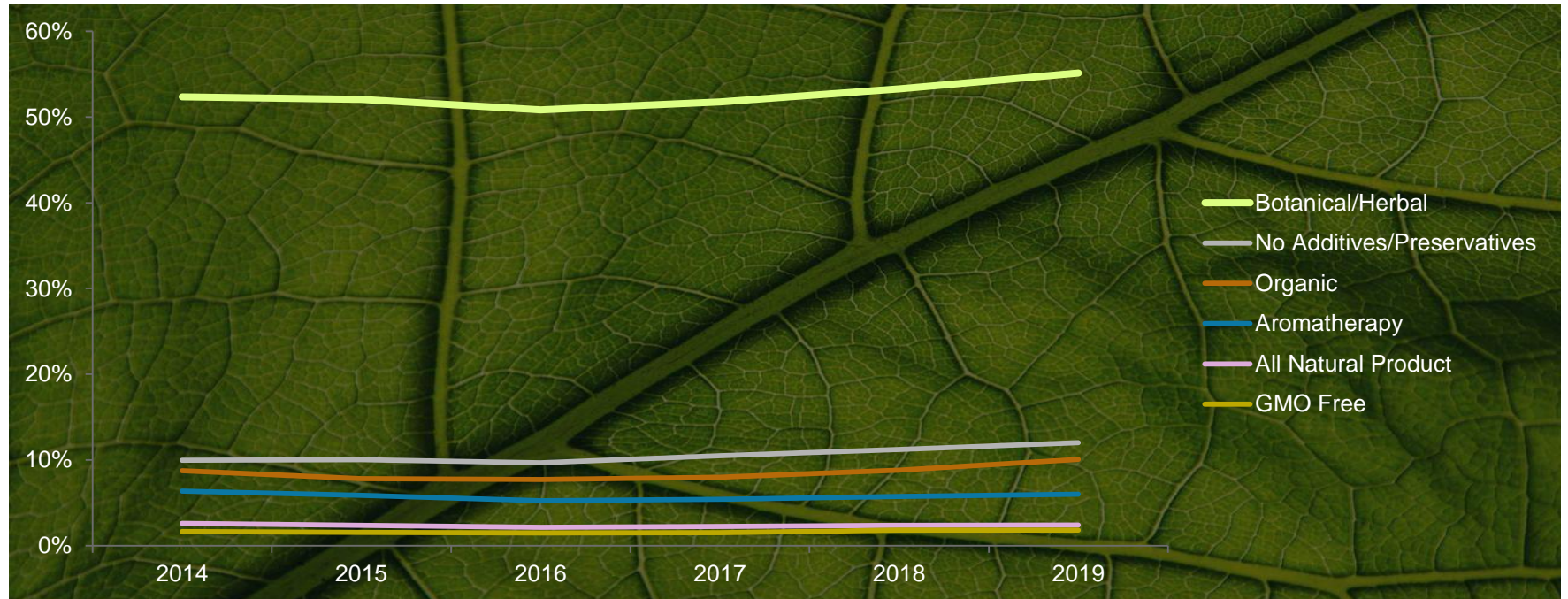


UK is #1 country with NPD positioned with Natural claims; Spain with highest growth amongst Top10

BPC launches evolution, *Natural* as the claim

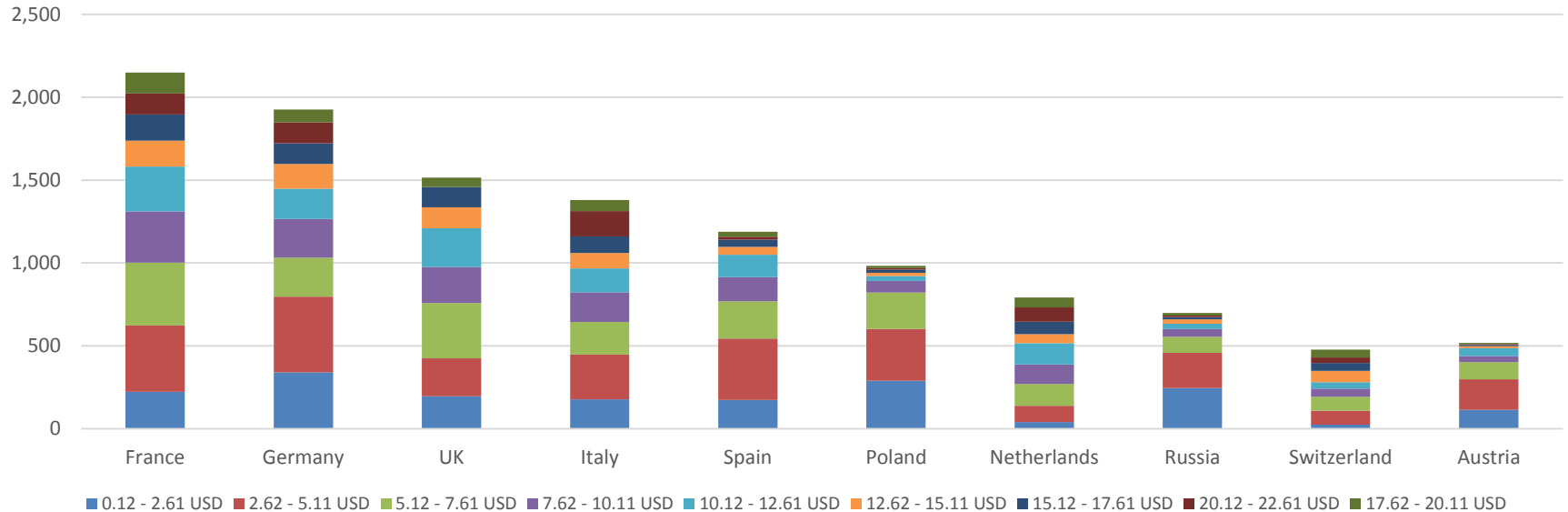


Botanical/ Herbal ingredients are still growing in global BPC launches



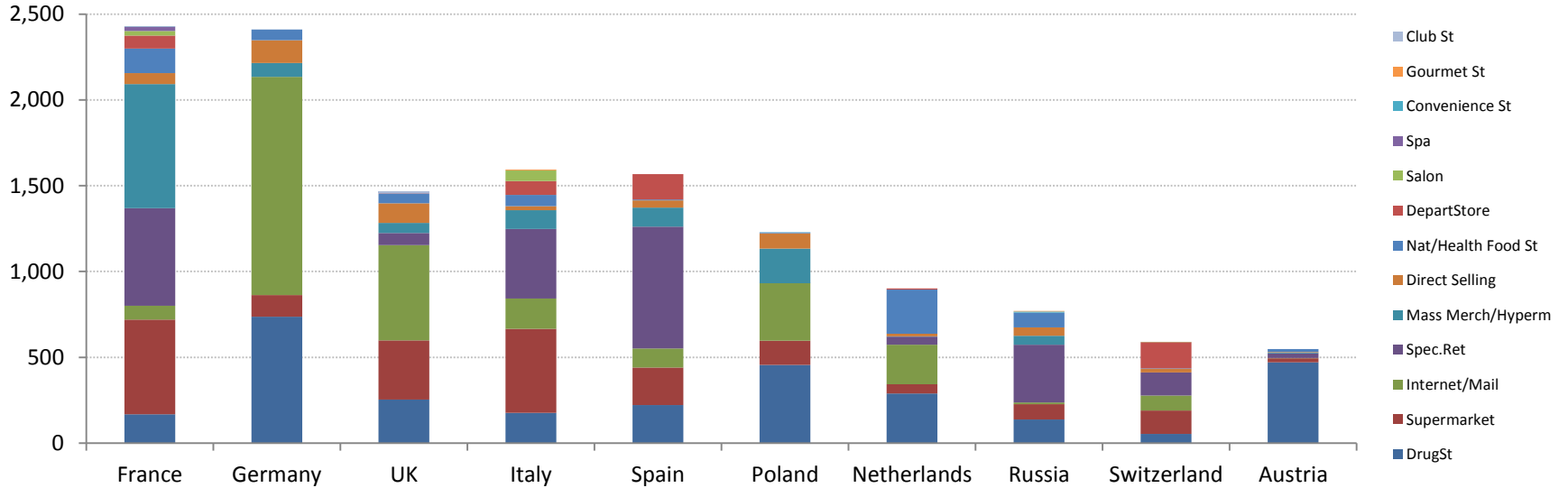
Mass market prices dominate Top 10 countries

Título del gráfico



France has the most diverse distribution system

Country vs Store Type
Jul'18 -Jul'19 YTD



Market sustainable and eco attributes

Natural NPD needs to alleviate consumer concerns over **sustainability** and **provenance**– with many expecting brands to be clear about the source of ingredients, and replacing natural resources used.

Organic, no additives/preservatives and eco claims in Body care are most active in Europe, with botanical also driving natural NPD in Europe.

- Botanical claims, natural ingredients and eco sourcing especially appeal:
- Over 60% of bodycare users in France, Germany, Italy and Spain agree that products containing botanical ingredients (eg aloe vera, shea butter) are **better for the skin** than those without;
- Over 70% look for products with **natural ingredients**;
- Over 30% select products based on **eco credentials** (eg responsibly sourced ingredients, not genetically modified).

SUSTAINABLE PROGRAMS

57%+

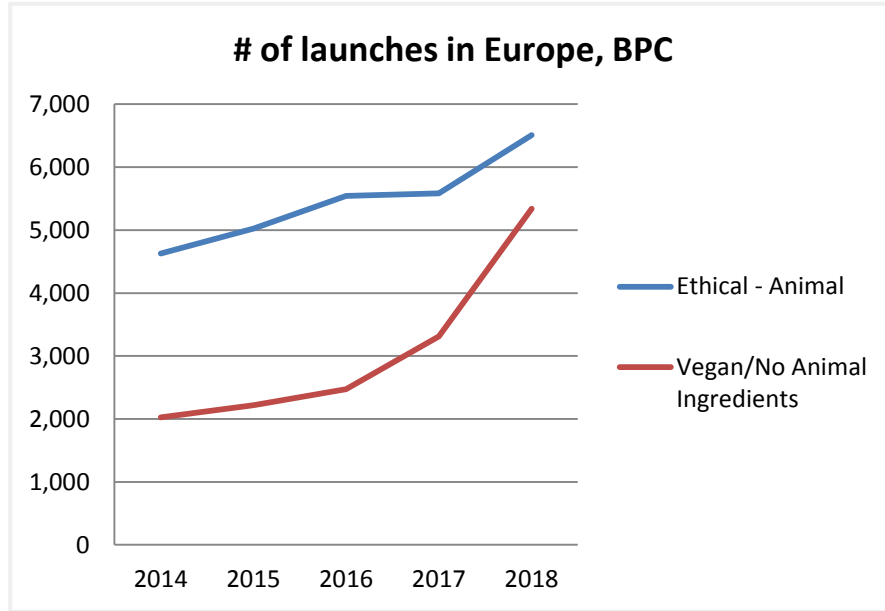
of Europeans think BPC brands should have a sustainable program that aims to **replace the natural resources used** in their products

Base: internet users aged 16+ who have personally used hand, body and foot care products in the last 3 months (France: 766; Germany: 787; Italy: 874; Spain: 846) (2018)/ internet users aged 16+ who have bought beauty and personal care products in the last 6 months (France: 1,947; Germany: 1,976; Italy: 1,973; Spain: 1,974)



Read on [mintel.com](https://www.mintel.com)

Vegan and Cruelty-free saw a strong rise in 2018 in European BPC launches



Animal concern drove the rise to veganism and cruelty-free products

Brands can take advantage of consumers' interest in veganism by launching **plant-based products or simply highlighting that current ones are made from these ingredients.**

Brands that push this ethical lifestyle angle will succeed, whether by highlighting their in-house sustainability practices or highlighting non-animal materials in their products.

Plant-based Pampering

The combination of plant-based products and beauty treatments is likely to appeal to young women as they are fans of being pampered; **62% of 16-24-year-old British women** have had a spa, beauty/grooming salon or other treatment area in the last 12 months compared to **30% of all adults**.

There is also appetite amongst younger UK consumers for more natural and organic toiletries as 59% of 16-24s want to see more of this type of product from big brands.



A new plant-based beauty 'palace' has launched in West London.

[Cloud Twelve](#) describes itself as 'a one-of-a-kind wellness and lifestyle club'.

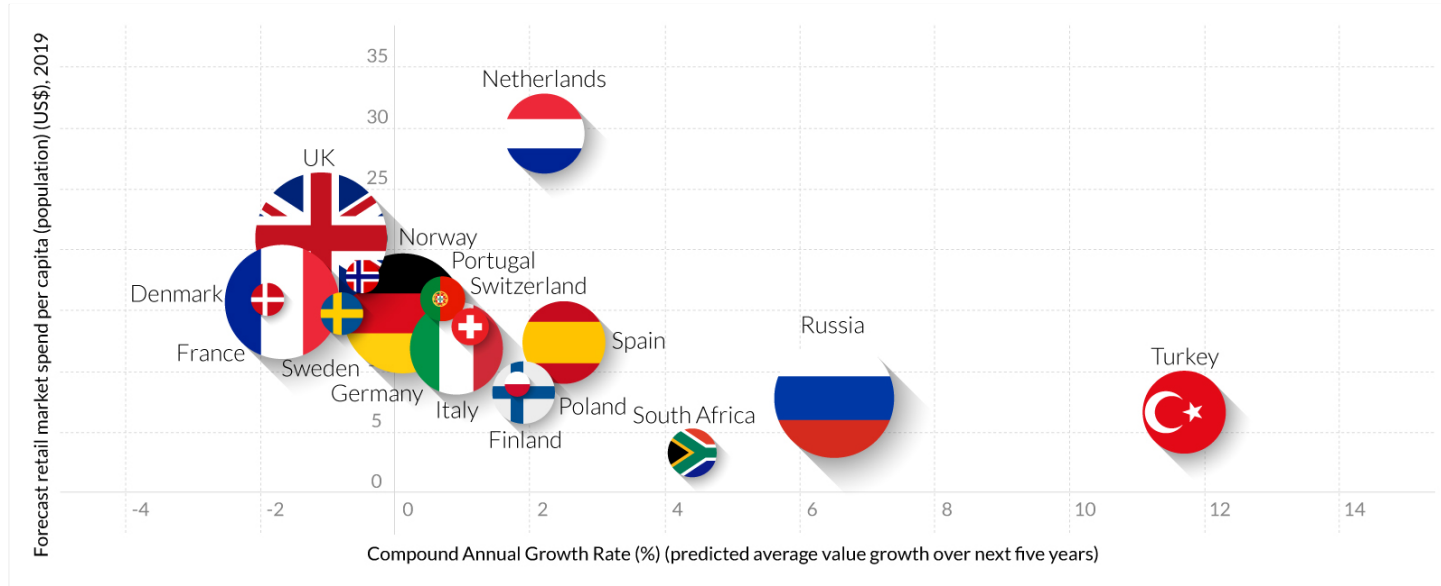
Key Hair Care Trends in Europe

A woman with long, wavy, reddish-brown hair is lying on her back on a grassy field. She has her eyes closed and a slight smile. Several bright orange flowers are tucked into her hair. She is wearing a light grey sweater. The background is a lush green lawn under bright sunlight.

MARKET INFO

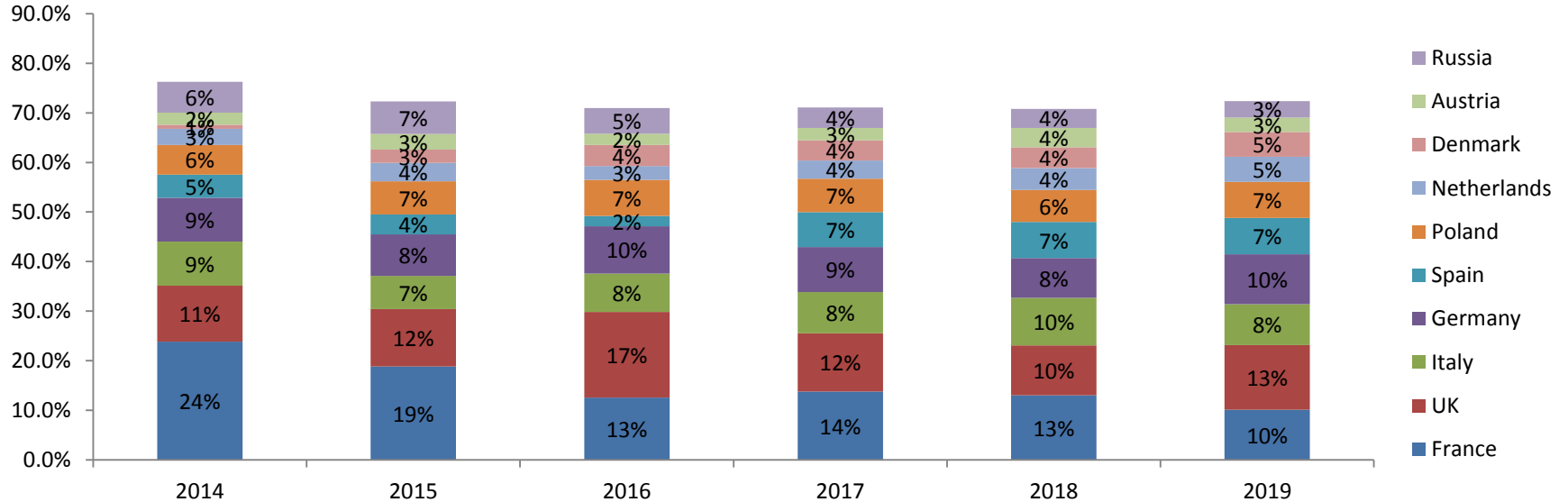
EMEA retail market overview: haircare, 2019

Discounting and special offers contribute to the contracting CAGRs in developed economies (eg UK and France). Turkey and Russia are markets to watch, showing highest CAGR.



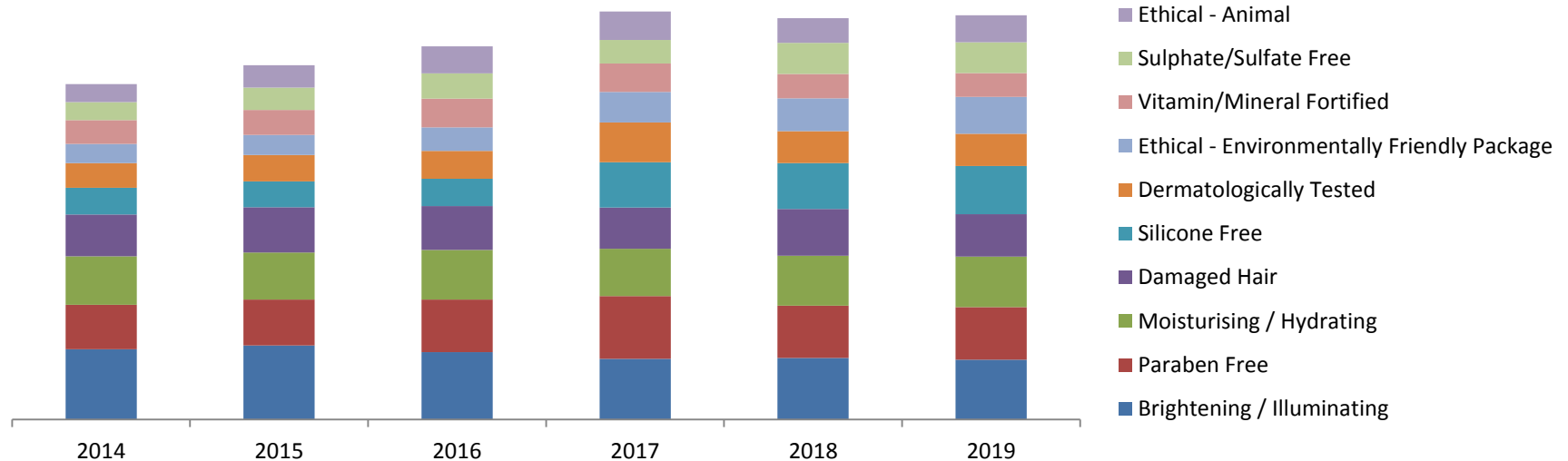
France is the leader of Hair Care launches with Natural as a claim

Date Published vs Country



Beautifying and caring for dry/ damaged hair are the main benefits, together with friendly formulation

Top claims associated with “natural”



Top 20 ingredients in Hair Care (claimed in the label)

Fragrance (inc. blend)	2016	2017	2018	2019 YTD
Argan	199	215	256	139
Coconut	84	154	155	77
Aloe Vera/Aloe	50	44	70	41
Shea Butter	30	33	41	41
Macadamia	49	24	41	21
Olive	55	42	24	13
Coconut Milk/Water	12	48	43	21
Pomegranate	20	55	20	19
Jajoba	22	37	23	23
Chamomile	33	30	29	12
Almond	16	22	41	11
Calendula/Marigold	23	15	33	16
Oat	20	25	22	20
Rose	16	33	25	12
Avocado	10	13	46	16
Bamboo	12	23	29	13
Lavender	7	8	37	14
Sea Buckthorn	29	20	12	3
Moringa	6	5	39	13
Tea Tree/Melaleuca	22	18	15	5

New ingredients origins seen in recent years

Ingredient Origin	2014	2015	2016	2017	2018	2019
Hawaiian	0	0	0	0	0	1
Greek	0	0	0	0	1	0
Rainforest	0	0	0	0	1	0
Lake District	0	0	0	0	8	10
Crete	0	0	0	1	0	0
Mountain	0	0	0	1	0	0
Moroccan	0	0	0	1	1	0
Faroe Islands	0	0	0	3	0	0
Altai	0	0	0	3	2	0

MAIN TRENDS AND INNOVATIVE PRODUCTS

Create more segments and target new occasions

In developed economies with a saturated haircare market, there is a gap in the market for:

- more products to target an **ageing** population with formulas that **care for thinning hair or are gentle on the scalp**,
- products that **care for the hair throughout the day** (eg **portable** formats) or during the **night** (intensive treatments),
- **pre-shampoos** that offer greater cleansing and appeal to women who are double-shampooing ([30% of women in the UK](#)) and spending longer washing their hair,
- **hair fragrances** that complement regular shampoos and bring an added sensorial experience (a fifth of German and Spanish consumers [apply fragrance to their hair](#)).

EUROPE

3%

or less of haircare NPD* was marketed as [anti-hairloss](#)

Engage with double-cleansing fans with pre-shampoo concepts

Pre-shampoo NPD can **focus on gentle cleansing and not over-stripping natural oils and friendly bacteria from the scalp or hair.**

Bolle Bio Maschera Capelli Goji e Olio di Jojoba (Goji and Jojoba Oil Hair Mask), suitable for sensitive skin, features a rinse-off formula with organic goji and jojoba oil said to be a pre shampoo treatment said to be applied on dry hair.

Bottega Verde's pre-shampoo scrub uses ginger to purify and exfoliate.



[Bolle Bio Maschera Capelli Goji and Jojoba Oil Hair Mask](#)

US\$ 4.20



[Bottega Verde Pre-Shampoo Scrub Ginger](#)

US\$ 12.32

Use stimulating natural ingredients to boost scalp circulation

[Dr. Organic's Coffee Hair & Scalp](#) collection, available in Anti-Dandruff and Stimulating (hair growth) variants uses caffeine in its formulation to help energise the scalp and hair.

The Stimulating line includes protein-packed guarana, intense chilli, ginger, lemongrass, black pepper and nettle.

UK, US\$ 5.21



Expand the niche hair fragrance market



TreacleMoon My Coconut Island Haar Parfüm

Hair fragrances can **complement the scent of regular shampoo and bring an added sensorial mood-enhancing experience.**

Over half of fragrance wearers in France, Germany, Italy and Spain agree that wearing fragrance can change one's mood.

TreacleMoon My Coconut Island [Hair Perfume](#) is a natural product and was launched in 2018, after the success of the 1st launch, in 2017. It is said to keep the hair free from odour, leaving a fresh, long-lasting scent, and is designed to nourish the strands with panthenol and wheat protein.

They have a unique silicone and polymer formula to **both care for/nourish and delicately scent the hair, adding multiple benefits.**

Germany, US\$ 4.83

Include familiar and nourishing food-based ingredients in your formulas



Many hydrating and repairing shampoo, conditioner and hair treatment launches this past year tapped into the [Mintel BPC 2025 Trend Gastronomica](#) – promoting the use of familiar and healthy foods – and also often emphasising naturalness.

A standout launch was [Garnier Fructis Hair Food](#), a 3-in-1 mask (conditioner, mask or leave-in treatment).

It is available in yogurt-style pots and marketed as "**superfruits for superhair**," vegan, free from silicones, paraben and artificial colours, and formulated with 98% natural origin and 96% biodegradable ingredients. It is available in four variants: macadamia (for dry and rebellious hair), papaya (to repair damaged hair), banana (to nourish very dry hair) and goji (to moisturise and intensively refresh shine of coloured hair).

US\$ 8.61

Hydrating natural claimed NPD into the Mintel BPC 2025 Trend, Gastronomica



Birch water

[Dixi Birch Water for Dry Hair](#). With natural birch juice, said to nourish the hair from the roots. The success of coconut water has [paved the way for other healthy 'plant waters'](#) to emerge, in both food/drink and BPC markets (Slovakia).

US\$ 1.44



Turmeric

[Dove Nourishing Secrets – Restoring Ritual](#). A shampoo, conditioner and treatments variant inspired by Indian rituals, for visibly damage-free hair, and enriched with caring and nourishing [on-trend turmeric](#) and coconut oil (Poland).

US\$ 1.53



Extra virgin olive oil

[Korres Pure Greek Olive Nourishing](#). A collection of shampoo, conditioners, treatments marketing not just the use of olive oil, but extra virgin olive oil, as well as olive leaf extract and wheat proteins for intensive hydration (Germany).

US\$ 10.58

Lush brings aquafaba into haircare

Lush has launched [vegan protein shampoos](#) made with aquafaba, touting its protein and saponin properties to help **protect and strengthen fine hair**.

Using aquafaba and various plant-powered ingredients, Lush created four vegan protein shampoos that each offer different benefits:

- The Black Stuff: with jasmine, orange flower and molasses
- Fix: with chamomile and marigold
- Café: with fresh mint and menthol crystals
- Silica: with spearmint oil, thyme and silken tofu

Chickpeas are rich in protein, as well as vitamin A and zinc, with properties that can help prevent hair loss and fight dandruff. Aquafaba is poised to be the **next big health food** flying off store shelves and could be seen as a **gamechanger for those who follow a vegan diet**, so brands should look to explore its impact on the beauty and hair space.

US\$ 29.95



Natural NPD uses superfood branding or showcases hero foods to denote health and naturalness



Superfood branding, quinoa, wheatgrass
[Saco Supernature](#) – ‘[Superfood for your hair](#)’.
A "next generation" range "rich in superfood technology", with biotin, pea protein, amla, wheatgrass and quinoa – to nourish hair/scalp – and organic/natural ingredients (US).US\$ 15.51



Superfood branding
[Sunfood Superfoods](#). A food, BPC and healthcare brand that promotes natural superfood ingredients. Includes Natural Plant-Based Shampoo and Conditioner, with raw, vegan, sustainably sourced, biodegradable and non-toxic ingredients (US).
US\$ 5.49



Manuka honey, yogurt, baobab oils
[SheaMoisture Manuka Honey & Yogurt](#). A collection to hydrate and repair curly hair by using on-trend and familiar superfood ingredients: manuka honey for moisture; yogurt extract to nourish; mafura and baobab oils to control damage (US).
US\$ 10.49

Animal-free claims gain importance in haircare

IN SPAIN

74%

of BPC consumers are concerned that the ingredients used in natural products are not sustainable

The **natural trend** has been popular in haircare for a number of years. Veganism is also growing and, for many consumers, **a vegan product is also viewed as a natural one.**

Product innovation in the prestige haircare sector reflects clean eating food trends. Veganism will **further propel the natural movement** as it taps into consumers' wider lifestyle choices.

NPD in ethical toiletries is on the rise, and **ethical consumerism** is growing as a trend in the beauty sector **Vegan and animal-friendly credentials** are important ethical considerations that will help **new brands build a loyal following and established brands win new users.**

The newest Avocado Hair Care products launched in Europe



John Frieda Detox & Repair Avocado Oil + Green Tea [Shampoo](#) is formulated with avocado oil and green tea extract for daily detox care and instant revitalization of dry, stressed and damaged hair.
(Belgium and other countries)
US\$ 4.94)



Bottega Verde Avocado [Shampoo](#) is described as a nourishing and 'silkyfying' shampoo featuring a rich and creamy formula with avocado pulp, said to gently cleanse without weighing strands down, and create curls that are easier to manage and more supple.
(Finland, made in Italy)
(US\$ 9.10)



Yves Rocher Nutrition [2 in 1 Cream Mask](#) is formulated with avocado oil that is rich in essential fatty acids and vital to the balance of hair, and agave fructans for a double microcirculation of the scalp and a perfectly nourished bulb.
(France)
(US\$ 7.24)

The newest Hair Care products launched in Europe with Natural Ingredients

Botanical/
herbal



Le Petit Olivier Aloe Vera & Thé Vert [Micellar Shampoo](#) contains aloe vera and **green tea** extract, and is designed to lighten, purify and make normal to oily hair shine.

(France)(US\$ 1.42)



DM Liebt Langhaarmädchen [Intense Repair Shampoo](#) is formulated with panthenol and an amino acid complex as well as coconut oil and **buriti** oil.

(Germany)
(US\$ 2.04)



Bio Spectra Attitude Super Leaves Science Quinoa & Jojoba [Moisture Rich Natural Shampoo](#) is formulated with anti-pollution, worry-free ingredients including quinoa and jojoba

(Belgium)
(US\$ 12.50)

The newest Hair Care products launched in Europe with Natural Ingredients

Organic



Balmonds [Scalp Oil](#) is described as a natural, moisturising hair and scalp treatment with organic olive, hemp, calendula, borage, chickweed and nettle oils plus tea tree and rosemary essential oil to purify and cleanse. (UK)
(US\$ 38.08)



Schwarzkopf got2b [#MyNaturalStyle! Detangling Spray for Disobedient Hairs](#) enriched with liquid soy (France)
(US\$ 5.70)



Garnier Ultra Dolce Nourishing Almond Milk [Moisturising Shampoo](#), suitable for dehydrated hair and daily use, features a formula with organic almond milk from Spain, a nourishing treasure which nourishes without weighting down, and organic agave lymph from Mexico, known for its revitalizing action. (France)
(US\$ 3.29)

The newest Hair Care products launched in Europe with Natural Ingredients

All
Natural
Product



Herbal Bionature [Anti-Grease Organic Solid Shampoo](#) features a 100% natural and handmade formula with nettle and fresh citrus said to offer a natural fragrance.
(Spain)
(US\$ 6.37)



Mr Bear Family Springwood [Springwood All Over Shampoo](#) is formulated with natural ingredients such as: witch hazel said to soothe irritated scalp; nettle to stimulate hair growth, and revitalise, and strengthen hair roots; and horsetail to prevent dandruff.
(Finland)
(US\$ 8.94)



Greendoor [Alkaline Natural Shampoo](#) features a neutral, fragrance-free formula with organic sesame, olive and coconut oils, and organic marigold and organic pomegranate that is claimed to strengthen the scalp and hair roots, and leave hair strong and healthy.
(Germany)
(US\$ 10.25)

The newest Hair Care products launched in Europe with Natural Ingredients

No
Additives/
Preservat
ives



Aussie Scent-Sational [Protect Conditioning Mist](#) is formulated with Australian macadamia nut oil, and is said to protect hair for up to 48 hours while offering a scent-sational fragrance.
(France)
(US\$ 6.98)



Pantene Pro-V Hair Biology Disciplined & Shining [Shampoo](#) contains hyaluronic acid, omega 9, and pro-V nutrients and is free from parabens, dyes, and mineral oils
(Italy)
(US\$ 5.67)



L'Oréal Botanicals Fresh Care Lavender Hydration Essence [Hair Mask](#)s infused with 98% natural ingredients, including lavender essential oil, and soy and coconut oils, said to intensively moisturise, and soften the hair.
(Belarus)
(US\$ 8.92)

The newest Hair Care products launched in Europe with Natural Ingredients

Aroma-
therapy



Love Beauty and Planet [Volume and Bounty Shampoo](#) with Coconut Water & Mimosa is claimed to load their products with goodness and pack them in recycled bottles, while infusing their delicate scents with natural and ethically sourced oils and extracts, and having a very small carbon footprint.
(Italy)(US\$ 8.95)



Schwarzkopf got2b Phenomenal [Refreshing Shampoo](#) features an invigorating scent and is said to cleanse and refresh sensitive scalp and skin.
(Greece)
(US\$ 7.94)



Faith in Nature Chocolate [Shampoo](#) is formulated with organic cocoa beans extract and vanilla infused with sage, said to nourish senses, while its 100% natural wonderful aroma soothes the day.
(UK)
(US\$ 6,22)



Final Considerations

What Mintel recommends



Mintel recommends

1

Fit the growing vegan trend

The **popularity of veganism** has led to increased demand for chickpeas and beans as dietary staples, therefore more water being used to soak them, so more aquafaba is available. Rice protein also fits this non-animal narrative. As more people seek out alternatives to animal or fish proteins, brands can **make clear vegan claims on pack**.

2

Build on trusted Foodie Ingredients

Aquafaba (bean/legume brine) shares many properties with egg white, so can be used as an alternative in haircare products. The ingredient can tell a similarly engaging story as **rice proteins/water** has done in the past and **avocado** begins to tell now – breathing new life into the category and building on **trusted home remedies** to connect with consumers.



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