

HAIR STYLING

MARKET SUMMARY *It has not been a good year for the Big 5 countries with regards to hair styling as every country saw losses across the board. It appears that the recession has made its mark on this market as things are even worse than they were in 2007, when things began to go wrong for the hair styling sector*

France The French hair styling market was certainly lacking in volume in the past year, according to IRI France. Its figures show that French supermarket and hypermarket channels reported a dismal set of results experiencing significant drops in both value and volume share. The hairspray market dropped by 3.7% to total €100.3m while the styling aids market dropped by a massive 9.9% to €200.3m. Volume wise, there were more losses as hairsprays fell by 4% to total 18.8m units and styling aids slipped by 11.4% to 52.5m units.

Germany Data from IRI Germany also painted a disappointing picture, indicating that the market slid by 1.4% in 2008 to total €507.92m compared with 2007's €514.8m. Volume results fared little better as unit sales lost 1.2% to total 55.67m units. The only sub-sector to have any kind of a gain was that of hairsprays which inched up by 0.9% to make €282.8m while hair gels, creams and waxes fell by 5.7% to €115.92m.

Italy According to data from industry body Unipro, the Italian hair styling sector slid in value by 2.5% from €224.4m to €218.8m in 2008. Of this total, hairsprays were still pulling in the most sales however, worth €89.91m, while styling gels followed next at €80.63m. Mousses and setting lotions accounted for a much smaller €48.28m

although this category did represent the fastest growing hair styling segment in the country. The leading hair styling company in Italy is still L'Oréal, which enjoys success in the market with its Studio Line, Garnier Fructis, Garnier Graphic and Cadonett brands.

Spain Spanish hair styling figures saw little improvement on their European counterparts as they too experienced a disappointing decline in 2008. Based on data from AC Nielsen, Spanish hair styling sales fell by 2.5% to €187.19m while unit sales fell by an even bigger 5.4% to total 68.1m units. When it came to formats, hairsprays accounted for 35% of the market share followed by gels and waxes at 33% and styling mousses at 28%. The least popular hair styling format in Spain was that of styling sprays which accounted for a minute 4% market share.

UK Consumers in the UK are turning away from hair styling products in their droves and this is borne out by sales slipping by 2.1% to £257.38m in the past year. Volume in units was also hit hard, tumbling by 3.5% last year to 126.69m units, according to data from TNS Worldpanel. Only two sub-sectors in the UK posted any year-on-year sales growth and these were aerosols and waxes/creams, with the latter increasing in size by an impressive 8.2%.

Europe: Top 5 hair styling brands by country

Total Big 5	France	Germany	Italy	Spain	UK
1 Wella	L'Oréal	Wella	Pantene	Pantene	TRESemmé
2 L'Oréal	Elnett	Taft	L'Oréal	Deliplus	L'Oréal
3 Taft	Vivelle Dop	Nivea	Nivea	L'Oréal	Alberto Balsam
4 Pantene	Timotei	Gard	Bilba	Fructis	John Frieda
5 Nivea	Fructis	Balea	Fructis	Giorgi	Wella

Source: TNS European Toiletries and Cosmetics Database (ETCD); for contact details see p835. Rankings refer to weighted penetration (% using) among women aged 11-74 over the 12 months ended June 2008

France

Lacking in volume

Following the same fate as the wider hair care market, France's hair styling market is experiencing a period of limp sales and is in need of a serious volume boost. Figures from the Fédération des Entreprises de la Beauté (FEBEA), on which ECM figures are calculated, were not available at the time of compiling this report, however statistics from IRI France, which chart the progression of sales in France's super and hypermarket channels (part of the wider mass market) show a dismal year for styling.

Supermarkets and hypermarkets experienced a drop in both sales and units sold across the entire styling sector, with styling liquids and gels suffering the worst losses, both in the double digits. The only recompense came from the hairspray sector, where the growing popularity for softer, more natural styles boosted the tiny area of soft hold hairsprays to a market value of €0.282m, a jump of 83%. As a result the number of units sold shot up by 113% to 42m.

Market analyst Mintel estimates that hair styling represented 22.4% of the total hair care market in France in 2008, the third largest sector behind shampoos and hair colourants. Furthermore, according to a TNS Worldpanel survey, French consumers used a styling product 4.1 times in a typical week (12 m/e March 2009). So the demand for products is out there – the problem seems to have been turning that demand into actual purchases, a problem that is also currently affecting the wider hair care sector in France.

TNS adds that the main reasons French women use a styling product is to detangle (70%) and add shine (49%), while for French men holding a style (72%) and hair management (52%) came out as the top two reasons for using a hair styling product.

Keeping it simple

As with the colour cosmetics market, fashion plays a key role in the fate of the hair styling sector, with pressure on brands to develop products that recreate catwalk looks. The trend for the 'no style style' which has crept onto catwalks recently has inspired manufacturers to create lighter, weightless textures that create a more natural, softer look, with no sticky after-feel which is so often associated with hair styling products.

Within L'Oréal's professional brand portfolio, natural styling has been a main focus. The 'less is more' approach was adopted by L'Oréal

Professional with its Texture Expert, a line of styling products described as 'cosmestyling' (cosmetic styling). The range comprises three collections tailored to different hair types, as well as a strong hold fixing mist, suitable for all hair types.

For fine hair there are four new products – Liss Ardent, a lightweight straightening cream that offers thermal protection against hairdryers and straighteners; Expansion, a volumising cream mousse; Smooth Essence, a lightweight cream that protects against humidity; and Tendre Forme, a structuring paste that offers definition to fine hair.

In the medium hair collection there are also four new products – Smooth Velours blow dry milk; Volumising Cream Mousse; Shine Protection Serum; and Lumicontrôle, a pearly moisturising wax. Finally for thick hair, the brand has created Smooth Ultime, a taming cream that softens and smoothes thick, unruly hair, and the Gelée Cashmere anti-frizz gel.

Shu Uemura's Art of Hair brand (L'Oréal) also gave a nod to the natural look with the launch of Silk Mesh, a new moulding cream containing silk fibres that promise to create a lightweight finish and natural looking shine.

Natural styling was also popular in men's styling with L'Oréal's Studio Line brand launching Mineral FX, a six-sku line containing active minerals that are said to strengthen hair and create natural looking styles. The products include Gel Crème de Contrôle, which promises light, non-greasy hold; Gel-Crème Modelant, which provides 24 hour hold; Pâte Effet Décoffé, a sculpting paste that provides natural hold and style; Invisi'Gel Ultra Fixante 24h, a strong hold styling gel; Invisi'Gel Très Fixante 24h, for stronger hold; and Invisi'Liquid Gel.

Alongside the natural look, natural ingredients have also proved a popular addition to styling products in France. La Biosthetique Paris' new Natural Cosmetic hair care line includes a number of styling references that are Ecocert certified, with ingredients derived from almost 100%

France: Hair styling market, 2009*

Product	€m	%+/-	units (m)	%+/-
Styling aids total	220.3	-9.9	52.5	-11.4
Waters	3.5	-13.2	1.0	-13.7
Gels	111.4	-13.2	28.0	-15.1
Sprays	71.6	-5.5	15.4	-6.2
Mousses	28.1	-6.3	6.5	-6.1
Other textures	5.6	-10.5	1.5	-9.4
Hairsprays total	100.3	-3.7	18.8	-4.0
Normal hold	27.0	-6.8	4.8	-4.6
Soft hold	0.282	+83.3	42.8	113.4
Strong hold	47.2	+0.2	8.5	-0.5
Other hold	25.7	-7.5	5.3	-9.0
Accessory total	109.7	-1.6	30.9	-2.0

*sales through super/hypermarkets 52 w/e 24 May 2009
Source: IRI France

Lacque Brilliance in Schwarzkopf & Henkel's Syoss range provides 24 hours of hold and a brilliant shine

natural sources. Products include Mousse Coiffante fixing styling mousse, Crème Brilliance shine cream and Laque Fixante finishing spray, which wraps hair in a fine film to protect it from drying out as well as providing a soft shine.

Similarly, Frédéric Fekkai (P&G) has reformulated a number of its products to include AquaNutrient technology, featuring marine infusions and botanical extracts to hydrate and repair dry hair. New styling products containing the technology include Zero-Humidity Frizz Control, an alcohol-free mist containing sea algae extract to tame frizz and smooth the hair cuticle, and Beach Waves, containing marine waters and light polymers which create tousled natural waves, and heat activated ceramides, which protect the hair against sun damage.

Damage control

Protecting against the damaging effects of heated styling appliances is another area where new product development activity has been high. Products that offer specific thermo protection have been popular within the styling sector for some time but recent launches have seen brands launching more comprehensive protection ranges which include shampoos and conditioners as well as styling protection products.

One such brand is Dove (Unilever), which launched its Thermo Défense range earlier this year. Alongside its hair care offering, the line includes Le Micro Voile Protecteur, a fine protecting mist that promises to protect hair against the daily damage of using heated styling appliances such as hair straighteners. The formula contains a combination of conditioning and caring agents which wrap each hair strand in a protective film to help lower the temperature of the hair fibre when exposed to heated appliances.

Kérastase (L'Oréal) meanwhile has focused on protecting coloured hair with the launch of Chroma Thermique, described as a thermo-radiance protecting milk for colour treated hair. The heat activated milk is said to protect against heat damage as well as boosting colour radiance and intensity.

And Thierry Lothmann's new Sweet Brush line, inspired by the glitz and glamour of the classic Hollywood age, includes two new products that protect against heat damage. Lait de Brushing Thermo-Actif contains corn proteins, rich in amino acids which coat the hair fibres and protect them against heat damage, helping to leave hair soft and smooth, while Sérum Sublimateur contains argan oil which helps repair split ends and adds shine to heat damaged hair.

Protection against specific sun damage is another area where brands have added references. L'Oréal Professionnel's Série Expert Solar Sublime is a shimmering gel, which is designed to protect hair in the sun, whilst enhancing its natural shine and Kérastase's Brume Jour Protectrice is a fine mist that is claimed to protect colour hair against photodegradation.

Tailored solutions have also branched out into age specific types, rather than hair types. Dessange (L'Oréal) has launched an anti-ageing hair care

France: Top five female styling brands, % share

Brand	Manufacturer	%
L'Oréal Paris	L'Oréal	23
Elnett	L'Oréal	7
Vivelle Dop	L'Oréal	6
Timotei	Unilever	6
Fructis	L'Oréal	4

Source: TNS Worldpanel

France: Top five male styling brands, % share

Brand	Manufacturer	%
L'Oréal Paris	L'Oréal	20
Vivelle Dop	L'Oréal	17
Taft	S & H	9
Auchan	Auchan	5
Fructis	L'Oréal	5

Source: TNS Worldpanel

and styling range which includes Mousse Coiffage & Soins anti-âge, a mousse containing omega 6 and green tea polyphenols which help protect the hair against UV damage; and Laque Finition & Brilliance anti-âge, an anti-ageing hairspray containing light reflecting particles and UV filters to add shine and prevent colour fade.

Spray segmentation

This year marks the 50th birthday of L'Oréal's Elnett hairspray brand and also highlights how diverse this sector has become over the years. From colour protection to flexible hold, there is a hairspray variant for every hair type and need.

To mark its anniversary Elnett has launched Laque Brilliance Diamant Fixation Suprême, claimed to provide the brand's strongest hold yet with a brilliant shine, while staying soft to the touch. The ultra fine mist is also said to disappear when brushed out to leave hair soft and shiny.

Saint Algue's (Schwarzkopf & Henkel's) Syoss range has also launched a number of glossing products in its Tenue Gloss range including Laque Brilliance, an extra strong spray that is claimed to provide 24 hours of hold with added shine.

Garnier Fructis (L'Oréal) meanwhile has taken inspiration from nature for its latest Flexihold hairsprays. Enriched with bamboo, the five-sku range is said to provide flexibility and natural movement with a strong hold that bounces back into shape. The line-up includes Finish & Hold-Strong, Finish & Hold-Extra Strong, Finish & Hold-Extreme, Volume & Hold and Colour & Hold variants so there really is something for every occasion.

Despite its lacklustre performance, the French hair styling market is pulling out the stops to try and tempt consumers back in and back purchasing. However the current economic downturn in the country is likely to do the market no favours in the short-term and the road to recovery may be further away than manufacturers care to think.



Germany Loosening its grip

The German hair styling market appears to have lost ground in 2008, seeing a loss in both value and volume terms, according to data from IRI Germany. The market slid by 1.4% in 2008 to total €507.92m compared with 2007's €514.87m. Volume wise there was a further slip of 1.2% as unit sales plummeted from 56.34m to 55.67m last year.

Unlike its counterpart hair care category (which includes shampoos, conditioners and colourants), hair styling seems to be sliding down German consumers' list of priorities. This could be something to do with the effects of the recession and the fact that consumers might have forgone more expensive styling products in order to concentrate on the more basic hair care items.

Fixing focus

Of the value total, hairsprays accounted for the largest slice of the pie at €282.85m, up 0.9%. Next came hair gels, creams and waxes at €115.92m, down a worrying 5.7%, closing the gap between itself and setting products which also lost ground but not as much at 2.3% to total €109.14m. In the volume stakes there were also losses all round with all categories taking a tumble. Again, hairsprays accounted for the largest share of unit sales at 39.005m units, a dip of 0.3%, followed by hair setting products at 9.62m units and hair gels, creams and waxes at 7.04m units, losses of 1.2% and 6% respectively.

On the retail channel front there was more bad news with even Germany's favourite drugstore channel seeing a loss of 1.2% to make €287.36m worth of sales, though this still made the largest channel. Hot on its heels were supermarkets of more than 800sq m making €121.97m worth of sales, down 2.3%. Discounters, supermarkets of less than 800sq m and perfumeries rounded off the list at €79.51m, €19.06m and €5.2m respectively. The only category which made a slight gain was that of the discounter, inching up by 0.5% which might indicate that German consumers are looking to buy cheaper styling products during

these belt-tightening times.

In IRI Germany's listings for styling formats, aerosol hairsprays again took a clear lead, taking 51.5% of the market share representing a healthy €261.7m. The next popular format was that of mousses at €89.95m, down 2.4% followed by gels at €79.54m, down 8.3%. All other categories made losses in 2008, apart from that of speciality styling products which put on an impressive 9.3% to make €20.3m, despite accounting for just 4% of the market share.

The least popular hair styling format in Germany is that of gel sprays, down an enormous 34.8%, making just €2.66m.

As far as desired styling effects go, most of the products sold in Germany were for basic hair styling needs – this category took a 49.3% market share worth €250.53m. Volumising hair styling products came next with a 17.8% market share, posting a gain of 5.6% and making €90.29m overall. Products to make hair shinier came in third place, taking a 12.4% market share at €63.01m. The least desired styling choices were anti-hair loss and anti-dandruff styling products

Germany: Retail channel sales, €m

	Value	%+/-
Total	507.92	-1.4
Retailers smaller than 800sq m	19.06	-4.9
Discounters	79.51	0.5
Retailers bigger than 800sq m	121.97	-2.3
Drugstores	287.36	-1.2
Perfumeries	5.20	-7.2

Source: IRI Germany

Germany: Total hair styling market, 2008, €m

	Value	%+/-
Total	507.92	-1.4
Hairsprays	282.85	0.9
Setting products	109.14	-2.3
Gels/creams/waxes	115.92	-5.7

Source: IRI Germany

Germany: hair styling formats, 2008, €m

	Value	%+/-
Total	507.92	-1.4
Non-aerosol hairsprays	21.15	-4.1
Aerosol hairsprays	261.70	1.4
Mousses	89.95	-2.4
Liquid setting products	19.18	-1.9
Gels	79.54	-8.3
Gel sprays	2.60	-34.8
Speciality products	20.30	9.3
Waxes	13.39	-0.9

Source: IRI Germany

Germany: Hair styling market value, €m

	Value	Volume
2007	514.87	56.34
2008	507.92	55.67

Source: IRI Germany

Raising its game

Sabine Kaestner from Lavera, Germany, feels that natural styling products are definitely worth keeping an eye on in the market

“At Lavera we offer three natural styling products for consumers – a gel, a hairspray and a styling mousse. These items are silicone-free and include organic aloe vera and bamboo in their formulas. These ingredients both nourish and strengthen hair without the need for harmful chemical ingredients and this is what an increasing number of German consumers are looking for. When it comes to the product fragrances, German men prefer quite masculine, woody scents while German women prefer fresh and fruity ones. Other than that they both care about how good their hair looks and take pride in the appearance.

“Many people turn to natural styling products because they have sensitive scalps and find that the less abrasive nature of products such as ours suit them well. I don't think we'll lose sales during these difficult financial times because hair styling is a very important issue to German consumers, particularly women.”

The new Schmusekatze styling line for teenagers comprises a hairspray and a finishing wax

which made losses of a huge 56.3% and 50.8% respectively.

And according to IRI Germany, although fewer consumers than ever were buying styling products, the ones that were required products to provide extra or ultra strength hold. These two categories took up 28.5% and 27.4% of the market respectively, though only extra strength products made a value gain, at 2.6%. One category which had also upped its game significantly from last year was that of mega strong hold products, which had seen a value rise of 23.6%, far outstripping its competitors, many of which saw losses.

Keeping busy

The German hair styling market relies on new launches from both domestic powerhouses such as Beiersdorf and Schwarzkopf & Henkel and also the multinational behemoths L'Oréal and P&G.

However, in the past year, it can be noted that German hair styling has been in the doldrums somewhat, if the sales figures are anything to go by. This could be as a direct result of the recession or it could be that German appetites were not whetted by the new products that came to market. As with 2007, launch pace was slow and what did reach shelves was of the fairly standard variety – without a great deal of innovation on offer.

It was in fact Schwarzkopf & Henkel which took up the baton last year, with several new launches across its brands.

Starting with Schauma, September last year saw the launch of the brand's Glatt & Glossy (smooth and glossy) line. This was described as the first Schauma range to address the needs of difficult, dry and frizzy hair and promising lasting smoothness and shine without the need for styling tools. The main styling product in the range is the smoothing serum with panthenol, which sits alongside a shampoo and a conditioner.

In the same month, Schwarzkopf & Henkel's Drei Wetter Taft styling range launched two new ranges in the anti-frizz segment. Drei Wetter Taft Glatt & Glossy comprises a hair foam, hairspray and a smoothing balm which promises 24 hour

smoothness in the battle to protect hair against heat styling tools. The products contain micro oils and the range's Soft Touch Effect complex to prevent hair from drying out.

This range was joined by Drei Wetter Taft Lockenflex – a foam and balm for curly hair. Using these products, says the company, will ensure that curls and waves last 60% longer.

In March this year there was yet more activity as Drei Wetter Taft was relaunched in its entirety to include improved formulations and new packaging. This was accompanied with the debut of another styling range, Drei Wetter Taft Ultra mit Silk Touch, which claims to combine ultra strong hold with a silky feel for the hair. The four-sku range houses a hairspray, foam, gel cream and wax. The products contain polymer molecules which coat each hair shaft from the roots giving that extra level of hold while being silky soft at the same time. Schwarzkopf & Henkel says the cream gel can be used on wet or dry hair for extra versatility and the wax is easy to apply and can be washed out easily at the end of the day.

And just last month Drei Wetter Taft relaunched its much hyped 10 Karat Glanz range (10 carat gloss) with a new formula called Brilliant Glanz Booster, which promises 24 hour hold combined with a multi-faceted glossy shimmer. The relaunch also featured two new line extensions in the form of 10 Karat Glanz Crème Gel (cream gel) and the 10 Karat Glanz Föhn Spray (styling lotion). Both products contain a formula said to create a super smooth surface which reflects the light off the hair like a diamond.

Gliss Kur also recently introduced two new products into its styling range – Extremer Halt + Control Haarspray (hairspray) and Extremer Halt + Control Haarschaum (styling foam). The hairspray contains microfine fixing agents said to tame hair and add volume and the styling foam is alcohol-free and hydrating for hair.

Finally, Schwarzkopf & Henkel also extended its Got2b line for teenagers in March. There were new additions to the Schmusekatze (smoochy cat) line with a new hairspray and finishing wax. There was also a new hair gel product in the Glanzstück range which promises hold combined with glossiness.

The company also rolled out two new launches for teenage boys. Got2b Superkleber (super glue) is described as the brand's strongest hair gel to date, which is also sweat and water-resistant. The



second product is the unusually named Dauerbrenner (evergreen) hair gel which is said to hold tresses in place for 24 hours, leaving no residue on the hair when washed off.

Dr Daniel Langer, Schwarzkopf & Henkel's vice president of marketing retail, explains why the Taft brand in particular is such a national favourite.

"The Taft brand offers consumers excellent hair styling formulas and modern packaging as well as being endorsed by German supermodel Heidi Klum. She is a great role model and style icon for many German women and they identify with her look and try and emulate her. There is little doubt that the range is more popular and sells better because of her association."

So are there many differences between the styling needs of German men and women? "Their attitudes towards styling are similar and they both want their hair to look good and well styled. But men prefer products to offer hold and structure and, while women also want this, they want their hair to be voluminous and shiny too."

Shine on

Over at fellow domestic giant Beiersdorf there were only two new styling launches throughout the whole year in the Nivea hair portfolio. January saw a line extension in the Diamond Gloss hair care range with the addition of the Glanz Finish Spray. The product is sprayed onto the hair after styling and smoothes frizz and static without weighing the hair down. The other new addition in July was the Haaransatz Booster (roots booster) styling spray which joined Nivea's Volume Sensation styling range. Beiersdorf says that the product offers extra strong hold and can be applied directly onto the roots, thanks to its innovatively shaped applicator.

Beiersdorf-owned hair styling brand Marlies Möller also had a quiet 2008. Adding to its popular Essential range, the brand targeted curly hair bringing the new Curl Control Defining Serum to market. The product is sold with Marlies Möller's Curls Comb, to help ease the product through curly hair which can become unruly. The product contains the brand's "curl memory effect" – this contains an innovative styling polymer to keep curls full of energy and defined throughout the day, according to the company. The serum is also said to have an anti-frizz effect which protects against the high levels of humidity that styling hair can entail. The panthenol supplies additional moisture and gives curly hair a healthy, supple appearance while intelligent active substances control and regulate the



moisture content of the hair.

Dirk Kraegan is the international trend team stylist for Marlies Möller – and believes that German women are more concerned than ever about how their hair looks.

"German consumers take a great interest not only in the condition of their hair but also in how it looks and how it is styled. She is very trend conscious but in a classy way.

"We have more product innovation planned for this month – we are launching two brand new shine products containing real rock crystals. These will make hair more resilient to external factors such as heat and wind as well as making it extra shiny."

Kraegan feels that German consumers are making compromises during these tough times by searching for cheaper alternatives. However he warns that cheaper is not necessarily better. "Hair styling products within the higher price segment are considered to be small, affordable pieces of luxury and they maintain a feeling of self indulgence and glamour which I feel is particularly important during hard times like these," he says. "By seeking cheaper alternatives people are clearly compromising when it comes to quality and efficacy. But we are hopeful that the high quality of Marlies Möller products will break through and consumers will continue to buy them. Quality will always win through in the end."

Curl concentration

The needs of curly hair have also been the focus for another brand popular with German consumers. Gühl (Kao brands) launched its Locken Kraft range in May and this comprises both a hair care and hair styling range. The two styling products are the Activating Curl Spray and the Styling Foam.

These products are formulated with Gühl's Locken Activeierungs Komplex (curl activating complex) as well as the main active ginkgo for increased elasticity and moisturising jojoba. The spray can be used on dry or damp hair and helps boost the curl and bounciness factor of hair while the mousse shields hair from frizz-inducing humidity without causing stickiness.

Bettina Schupp from Gühl's R&D department says the range is perfect for the estimated 48% of German women who have curly hair: "With curly hair every individual hair is curved and twisted and therefore the hair's cuticle layer does not lie flat and smooth against the hair shaft as is the case with straight hair.

"Instead it sticks out at angles and can be damaged easily by brushing and styling. This means that curly hair is also frequently drier than straight hair and needs

Beiersdorf's Haaransatz Booster boosts volume to the roots using its innovative nozzle applicator

Garnier's new Fructis Bamboo Flexihold Hairspray contains bamboo to make the hair shaft resilient yet flexible

additional hydration.

"Besides hydration and protecting against humidity, products for curly hair must also boost the natural curl by increasing elasticity without making the hair sticky and weighing it down."

Flexing its muscle

Meanwhile over at P&G, the Wellaflex styling portfolio boasted a couple of new additions. January saw the launch of its Hydro Style range, featuring a hairspray and mousse to provide extra strong hold and a blow dry spray which can be applied to wet or dry hair to refresh any hair style. The products include the brand's Hydroactive Complex to address the moisture balance of hair and to prolong hydration when styling. The second launch from Wellaflex was the debut of the Fülle and Style (fullness) range in July. This is a three-sku styling line including a foam, hairspray and refilling fluid. The products contain panthenol, said to envelop each strand of hair and fill up the thinner parts of the hair shaft thus adding volume and strength. P&G claims that when using these products hair will look noticeably fuller and thicker and each hair strand will appear enhanced without actually becoming sticky and weighed down.

L'Oréal also had a few new launches across its brand portfolio. Its Garnier Fructis line launched one new product right at the beginning of the year – Fructis Style Bamboo Flexihold Hairspray, enriched with bamboo

extracts, renowned for their resilient yet flexible properties. This ultra-fine micro diffusion spray creates a fine mist which is said to dry instantly and give a lustrous finish.

Meanwhile, Fructis' stablemate, L'Oréal Paris, rolled out its new Elnett Satin Very Volume hairspray range, enriched with pro-keratin, in March this year.

The product is said to create volume and shape with natural movement in Supreme Hold and Extra Strength variants. And more recently German consumers have been treated to a new collection of L'Oréal Elvive Conditioning Sprays – four leave-in conditioning sprays which can be used daily to offer a nourishing boost.

The four different types are for Radiance and Colour Protection, Resilience and Repair, Mirror Shine Cashmere Touch and Anti-Flyaway and Anti-Frizz.

Launch pace from many of the big multinationals was fairly stilted in 2008, and German hair styling enthusiasts were hardly inundated with rafts of innovative new product launches. In fact it was domestic hair styling stalwart Schwarzkopf & Henkel which brought the largest number of products to market. The multinationals played it safe with a few new additions, often adding to existing lines. This lack of activity may be in part to blame for dwindling sales figures and if these have any chance of recuperating, manufacturers are going to have to up their game for the rest of this year and into 2010.



Styling the nation

Tina Köhler is brand manager for Wellaflex Germany. It is her job to make sure that Wellaflex hair styling products address the varied styling needs of German consumers

How seriously do German consumers take their hair styling needs?

A person's hair is one of the most prominent features on any individual and makes a very big impression on others, particularly if it is the first impression. This is why German women in particular take pride in having well groomed hair and immaculate hairstyles.

How much time do they set aside for hair styling purposes?

Quite a bit I would say – hair styling is an important part of a German consumer's beauty routine. It is important that their styling products help create the looks they desire and guarantee long lasting hold throughout the day. The longevity factor is crucial as consumers do not want to be restyling their hair several times throughout the day.

What does the Wellaflex brand offer consumers that other brands do not?

Wellaflex is the number one salon brand in Germany and has been around for 125 years so we have a tremendous heritage. The key Wellaflex product benefit is that our products offer excellent hold for up to 24 hours. We have a huge range of products to cater to any styling need a consumer may have and that is why we perform so well in this market.

Which are the best selling Wellaflex products?

Products to increase hair's volume continue to be best sellers we find and our 2 Day Volume products fly off the shelves to cater for this need. Our new Fülle and Style range has also been selling very well since it launched and the trend to make hair appear thicker and more lustrous is very key right now in Germany. And an eternally successful product for Wellaflex is our Form & Finish hairspray which gives a very natural yet bouncy hold for up to 24 hours.

Italy

A predictable decline

According to Unipro figures, in 2008 the Italian hair styling market totalled €218.82m, a 2.5% loss on 2007 when the market was worth €224.42m.

However, this does not come as much of a surprise to manufacturers considering previous years' disastrous performances in this sector. In 2007, losses stood at 3.6% and in 2006 they stood at an even more worrying 8.6%.

In the past few years, Italian consumers have cut down on what they consider to be 'touch up' products and last year the recession brought about the trend for a more natural look for hair. At the moment this look is very fashionable in Italy and doesn't require the major use of hair styling products so it was perhaps inevitable that sales within this sector would fall.

Favourite formats

Looking at product types in hair styling, hairsprays were still the best performing category in 2008 since they are considered the most effective way to get the desired results. This category was worth €89.91m while gels and setting gels followed next at €80.63m. The consumer group that uses these particular styling products is very broad since it comprises different age groups and also male consumers. Meanwhile fixing mousses and setting lotions accounted for a smaller €48.28m but represented the fastest growing segment in Italy.

Dr Maria Bisogni, general manager for Nivea Italia's hair styling team, says: "The major losses we have seen in hair styling happened in the gel segment which fell by 5.9% in 2007 and this hasn't been entirely compensated by the 2.3% growth that the mousse segment has shown. Female consumers have however purchased many products that help to straighten the hair and which improve the appearance of straight hair.

The very dynamic and innovative selection of products which promise to make hair shiny have also performed very well.

"With regard to our male consumers we have seen growth especially in products that have extreme fixing and styling benefits and that can hold the desired hairstyle over a long period of time. In 2008, product performance has definitely been the key driver in the segment."

Taking a closer look at manufacturers in Italy, hair styling continues to be, as with hair care, a market dominated almost exclusively by L'Oréal. The company is present on the Italian market with several brands including Studio Line, Garnier

Fructis, Garnier Grafic and Cadonett. Only one other multinational, Procter & Gamble manages to challenge this supremacy with its Pantene Pro V line which is ranked in fourth position.

Channel wise, mass distribution was the winner, ringing €116.18m worth of business through its tills, leaving only slim pickings for the other channels.

What consumers want

Certainly the hair styling market in Italy is well established and consumers are well informed and therefore careful about their purchases. In 2008 Italian consumers definitely demanded more effective hair styling results. Products not only had to excel in performance but also have added qualities to give hair an extra touch of beauty with consumers demanding products that highlight the condition of their hair or make it look shiny and healthy. Thus the gap between hair care and hair styling products has become somewhat blurred. At the same time consumers want products that are not too aggressive for the hair, creating a natural effect without filling it full of chemicals. Functionality, innovation and a good price point are at the top of consumers' wish lists when it comes to hair styling and manufacturers had to keep this in mind and try and meet expectations.

When it comes to new products, Garnier Fructis Style (L'Oréal) launched items that promise long lasting performance and to take care of the hair while tending to its styling needs. Its new product, Garnier Fructis Hydra Liss, is a fixing spray with an anti-fizz action said to be effective against damp weather and to nourish hair at the same time.

Meanwhile for men the Studio Line Indestructible range (L'Oréal) features the Indestructible Wet Gel Effetto Bagnato, the Indestructible Gel Concentrato and the Out of Bed Crema Fibrosa, which is a thick cream to create a scruffy look. The Agenti Fissanti Flessibili (flexible fixing agents) it contains are said to leave hair soft without hardening it.

Pantene Pro V (P&G) has launched the Volume in Movimento line said to encourage volume. It features the Lacca Volumizzante, a spray for hair sporting a natural look, and the



Italy: Hair styling market value, 2006-2008

Hair styling products	2006	2007	2008
€m	232.79	224.42	218.82
%+/-	- 8.6	- 3.6	- 2.5

Source: Unipro

Italy: Hair styling, breakdown of retail channels, €m

	Pharmacies	Perfumeries	Other channels	Of which mass distribution	Total	% +/-
Hair styling	1.28	21.81	195.73	116.18	218.82	- 2.5

Source: Unipro

Among domestic manufacturers, the Mirato Group has invested in research and development to keep up with international competitors

Spuma Volumizzante, a mousse for extra strong hold that claims to protect the hair from daily brushing and hairdryer damage.

Pantene Pro V meanwhile is present in Italy with five hair styling lines and also caters for curly hair with Ricci Perfetti Gel Spray Modellante, a gel that comes in a spray format and is said to be ideal for modelling and defining curls.

Last year, Nivea (Beiersdorf) launched the Diamond Gloss Styling range designed to give long hair a diamond-like reflection. The range features Spray Diamond Gloss and Styling Mousse Diamond Gloss which both contain vitamin B3 and a silicon technology said to guarantee elasticity and softness for the hair.

The Nivea Fluido Modella, also launched in 2008, is a product created specifically for curly and coarse hair and is said to define curls while taking care of the scalp at the same time.

In Beiersdorf's Nivea For Men line, the company launched the Aqua Gel Wet Look, the Speed Power Gel and the Real Style Pasta Natural Look. The last of the line-up is a gel for extra hold said to give a natural look which, according to Bisogni, has proved successful so far.

She comments: "Our strong and extra strong styling products experienced positive growth in 2008, growing by 8% on 2007 as Italian consumers were much more focused on immediate results than previously, which benefited us."

Other manufacturers that don't offer such a comprehensive hair styling line still made their presence known by launching new products, often in the form of hair gels, onto the market.

Neutro Roberts (Manetti & Roberts) for example brought out Neutro Roberts Styling Gel Forte (strong), Neutro Roberts Styling Gel Extra Forte (extra strong) and Neutro Roberts Wet Gel for a wet look effect. Similarly, three Revlon gels made their debut on the Italian market last year – Revlon Gel Ultra Fix, Revlon Gel Liquid Fix and Revlon Gel Styling Fix. These products come in 200ml formats and are said to feature largely natural formulations enriched with vitamins. Dermatologically tested, the Revlon gels are said to be ideal for protecting and nourishing the scalp as well as for creating trendy hairstyles.

Closer to home

Among local manufacturers there was also some activity. In the 1960s, the Mirato Group launched its now legendary Hairspray Splend'Or onto the market to much interest as it was one of the country's breakthrough styling products. At the time the company's chairman, Corrado Ravanelli, realised the potential of this product and his intuition proved to be correct as it went on to sell millions. Talking about the current market Dr Piergiuseppe Fanello, marketing director of the Mirato Group, says: "In these difficult economic times we have been very careful to produce high quality products at the right price. We have tried to be innovative especially in those segments where we are the market leaders such as with our brands Splend'Or, Malizia, Intesa and GomGel.

"Last year Italian hair styling was strongly influenced by the natural trend so things have



Italy: Hair styling formats, €m

Product	Value
Hairsprays	89.91
Fixing mousses & setting lotions	48.28
Gels & setting gels	80.63

Source: Unipro

Italy: Top five hair styling brands, 2008

Brand	Manufacturer
Studio Line	L'Oréal
Garnier Fructis	L'Oréal
Garnier Grafic	L'Oréal
Pantene Pro V	Procter & Gamble
Cadonett	L'Oréal

Source: Euromonitor International

moved away from the concept of a sticky and heavy sprayed hairstyle to a less rigid and less defined look. There has also been much more focus on products that highlight shiny hair and these are all areas we have tried to focus on ourselves."

The Lacca Forte Malizia Ecologica Ecofix and the Lacca Forte Splend'Or are two hairsprays that Mirato launched last year and both are said to have environmentally friendly packaging. Mirato also had an eye on size as it has launched the hairsprays in 75ml formats, ideal for the frequent traveller.

Fashion fixture

Hair styling and fashion have lots of influence on each other and this is particularly true in Italy.

Italian fashion trends have given way to more natural, less structured clothes and hair styling trends have followed suit with softer, lighter hairstyles being preferred to more rigid and sculpted forms.

In Italy, Wella (P&G) works in partnership with salons and hairdressers and often styles models for prestigious catwalk fashion shows.

In 2008, Wella's professional stylists took care of the models' styling needs for the Nude Show, a high profile event at Milan Fashion Week. The products used were taken directly from Wella's recently launched High Hair line which consumers can also purchase. These products feature four different treatment areas – Volume, Onde & Ricci (waves & curls), Liscio & Lucentezza (glossy & sheen) and Styling Creativo. The High Hair line claims to provide "styling products for all hair needs". Among the High Hair products, the unusually named Flubber is an extra-strong gel said to provide extreme hold while reinforcing and protecting hair thanks to pro vitamin B5 and UV filters. The High Hair products address different hair styling needs, offering solutions for consumers who want a natural, light, strong or extra strong look and hold, according to the company.

Meanwhile Italian styling brand Alfaparf, based in Milan, was founded with the idea of taking hair styling to a level comparable with high couture fashion. The company currently works with 80 stylists worldwide to create innovative hair care and hair styling products. The new line from

Alfaparf is the Semi di Lino Diamante line which features linseed as its main ingredient, capitalising on the growing desire for natural hair styling products. The Illuminating Sculpting Spray is said to fix and define the hairstyle and dry quickly without leaving the hair sticky. The line S4U from Alfaparf also offers a raft of products for younger consumers – F'nK is a wax said to give an opaque effect and Posh'N is a pre-styling treatment to condition hair.

Another Milan-based hair styling company is Lisap, founded in 1952. This company also works alongside hair stylists to promote the concept of mixing style and innovation. Lisap today caters for an international consumer base offering a variety of hair styling products for sculpting and finishing. The Sculpture line features Shiny, a glossy liquid said to be ideal for the final touch, and is a best seller for the company.

American stylist Geri Cusenza, who founded hair care company Sebastian with her husband, also enjoys growing popularity in Italy. There are now three hair styling lines on the Italian market, much to customers' delight, called Flow, Form and Flaunt.

Flow features products that are positioned to sit between hair care and hair styling and products include Whipped Cream, a nourishing styling cream said to be very delicate for the hair and scalp. The company says the product should be applied to wet hair and claims it creates perfect waves. Sebastian's Potion 9 meanwhile is a leave-in treatment which claims to offer hair styling benefits. The product can be used on damp hair for definition and applied to dry hair for texture and control. The Form line features the Texturizer, a liquid gel to define curls, and Craft Clay, similar to a wax and used to define and separate short to medium length hair. Lastly the Flaunt line features Halo Mist, a light spray to create shine which incorporates UV filters.

In 2009, hair styling launches and innovation have continued in much the same vein as 2008 which makes it difficult to predict any sort of a

The styling habits of a nation

In July, AC Nielsen interviewed a panel of 17,000 Italians over 14 years of age in order to ascertain their hair care and hair styling habits. The results of the research, provides an interesting indication of consumer preference

The panel was made up as follows: 51% of those interviewed had straight hair, 38% had wavy hair and the remaining 11% had curly hair. According to the study, 99% of the women admitted that they dedicate a fair amount of time to their hair care and hair styling needs. The same was true for 79% of the men interviewed.

Among the individuals who said that they do give time to their hair, women in the 25-34 age range stood out as the group most inclined to experiment with new hair styling products, followed by men in the same age range. Younger generations came next while Italians in the 45-65 age range showed little interest here.

Women in the 25-34 age range said that they prefer to buy expensive hair styling products because of their perceived higher quality. According to the research, the most popular product was hairspray, most often purchased by women. Gels followed next and in this case were mostly used by men.

Some respondents said that they used hairsprays and mousses "less than once every two weeks" while the old classic of hair wax was the product used the least, according to the results.

With regard to the occasions when hair styling products were used, these were mostly for special occasions and at work or school, in that order. During holidays Italians seem inclined to let their hair down and don't use hair styling products at all. Products were most often bought in super and supermarkets while smaller retailers and pharmacies appeared less popular places to buy such items.

True to form, Italian men were most likely to have somebody else in the household buy styling products for them rather than actually going out and buying them for themselves. The most likely person to do this was a wife or girlfriend.

recovery. Manufacturers in Italy are trying to remain positive and upbeat, despite continually sliding sales, but good launches and eye catching products will only reap rewards if consumer interest is ensured.

Spain A styling slump

Spanish hair styling products have been in a slump for several consecutive years ever since volume sales began to decline in 2006. Based on the moving annual total in January/February 2008-2009, volume sales for hair styling products amounted to 68.1m units worth €187.19m, respective declines of 5.4% and 2.5%, according to

Spain: Hair styling market, 2008

	Jan/Feb 2008	Jan/Feb 2009	%+/-
Volume (units m)	71.9	68.1	-5.4
Value (€m)	192.07	187.19	-2.5

Source: AC Nielsen

Fragancias y Cosmética based on figures from AC Nielsen. Market research firm IRI Spain has also reported declining sales for hair styling products. In 2008, unit sales dropped by 5.4% from 60.25m units to 57.02m units from the previous year while value sales fell by 2.5% from €170.97m to €166.72m.

Not gelling

Hair gels, once the main driver behind the Spanish hair styling market, have fallen from grace among Spanish consumers especially among the young and fashion conscious. Hair fashions are continually evolving and yesterday's super-stiff styles have given

Laboratorios Belloch's Nelly brand remains a firm favourite among Spanish consumers when it comes to hair styling

Spain: Hair styling market value, €m

	2009	% share	%+/-
Hairsprays	65.5	35	-2.5
Gels/waxes	61.7	33	-2.5
Styling mousses	52.4	28	-6.0
Styling sprays	7.5	4	30.0
Total	187.1	100.0	-2.5

Source: AC Nielsen

Spain: Hair styling market volume, units m

	2009	% share	%+/-
Hairsprays	23.8	38.2	0.3
Gels/waxes	23.8	32.1	-8.0
Styling mousses	18.4	26.9	-8.8
Styling sprays	2.0	2.8	-5.4
Total	68.0	100.0	-5.4

Source: AC Nielsen

way to more flexible, no-frizz hairstyle with lots of volume. Fewer young male consumers are sporting the wet look and are using less gel on short hair cuts preferring it to be natural instead.

Interestingly, among all types of hair styling products, hairspray is the only category to report stable sales of late and women are overwhelmingly the largest consumers of this category. Hairsprays now equal gels in volume sales and outperform gels with a 35% share of total value compared to a 33% share for hair gel. And penetration for hair styling products has fallen in Spanish households – volume sales for all categories, with the exception of lacquers, have fallen by more than 5% with gels declining by 8% and hair mousses by nearly 9%. At the same time, value sales have been hit particularly hard by a significant rise in competitively priced large distributors' own label brands.

One anomaly to this trend has been the performance of non-aerosol sprays which experienced a remarkable 30% increase in value terms while overall volume fell by 5.4%. The reason behind the surge in value can be attributed to a small but growing trend in the use of selective hair salon products such as John Frieda's (Kao) Luxurious Volume line, a non-lacquer spray. Llongueras (Colomer), promoted by the high fashion hair salon chain of the same name, was awarded the Product of the Year 2009 accolade by a TNS survey among Spanish consumers for its two new lines Look Corto and Look Largo. In a full range of styling products, Look Corto gives short hair a natural, stylishly tousled effect while Look Largo offers products for natural curls as well as a sleek, detangling agent for long, straight hair. This year is the tenth anniversary of the Product of the Year Awards in Spain.

Hair styling heritage

With more than 50 years on the market, the most popular hairspray in Spain is the domestic Nelly brand made by Valencia-based Laboratorios Belloch. Nelly commands 29.1% in total volume



Spain: Brand ranking for hair gels, 2008

Brand	Manufacturer	% value	% volume
Giorgi	Laboratorios Genesse	36.3	35.0
Fructis Style	L'Oréal	11.8	8.9
Studio Line	L'Oréal	7.9	4.5
Polyswing	Schwarzkopf & Henkel	7.5	6.6
Grafic	L'Oréal	4.3	3.2
Babaria	Berioska	2.8	3.4
Pantene Style	Procter & Gamble	2.4	1.5
Dicora	Prolimsa	2.0	2.6
Shockwaves	Procter & Gamble	2.0	1.4
Llongueras	Colomer	1.8	1.5
Own label		14.0	24.3

Source: Fragancias y Cosmética

Spain: Brand ranking for styling mousses, 2008

Brand	Manufacturer	% value	% volume
Pantene Style	Procter & Gamble	25.5	19.9
Fructis Style	L'Oréal	16.4	14.1
Giorgi	Laboratorios Genesse	9.1	10.7
Polyswing	Schwarzkopf & Henkel	6.5	6.6
Llongueras	Colomer	5.3	5.5
Grafic	L'Oréal	4.6	3.5
TRESemmé	Alberto Culver	4.1	1.7
Studio Line	L'Oréal	2.8	1.9
Elvive Styliste	L'Oréal	2.1	3.0
Shockwaves	Procter & Gamble	0.7	0.6
Own Label		13.6	21.3

Source: Fragancias y Cosmética

terms and 17.4% in total value terms. However, Elnett by L'Oréal is the number one brand in overall value terms with 28.3% of the total value share but only 12.9% in volume. The Pantene Style by P&G and Sunsilk by Unilever brands rank third and fourth respectively.

The Spanish Laboratorios Genesse, a division of the Barcelona-based AC Marca Group, which produces the popular Giorgi Line, dominates the gel segment with a market share of 35% in volume and 36.3% in value terms. Meanwhile Fructis Style by Garnier comes in second with 8.9% of total volume and 11.8% of total value share.

In styling mousses, Procter & Gamble's Pantene Style leads with a 25.5% share in value and 19.9% in the volume stakes. Garnier comes second with Fructis Style holding 16.4% of total value and 14.1% total volume.

New to market

Among new product launches in Spain are the new additions to the Agua Nelly line which uses

Spain: Hairspray brand ranking, 2008

Brand	Manufacturer	% value	% volume
Elnett	L'Oréal	28.3	12.9
Nelly	Belloch	17.4	29.1
Pantene Style	Procter & Gamble	16.8	12.3
Sunsilk	Unilever	11.0	11.1
Fixpray	Colomer	3.2	3.8
Cadonett	L'Oréal	1.8	1.5
Fructis Style	L'Oréal	1.6	1.2
Dicora	Prolimsa	1.2	1.9
Giorgi Line	Laboratorios Genesse	0.4	0.4
Babaria	Berioska	0.3	0.5
Fixonia	Colomer	0.2	0.2
Own label		5.7	11.6

Source: *Fragancias y Cosmética*

vitamin B5, a sunscreen and natural sea silk extracts to moisturise, repair and facilitate combing for easy styling in three products – Extra Volume, Extra Strength and Ultra Curls. At the same time, Nelly has reformatted its products to offer a new look and extended the line to include new formats in extra large and travel sizes. A non-frizz formula has been added to the classic Nelly normal and extra strength hairspray offerings. Another classic hairspray with over 50 years' heritage on the Spanish market is Elnett which is available in two new versions – Elnett Volume for naturally added volume and Elnett Diamante for long lasting hold and shine. Fructis Style meanwhile has introduced a 24 hour anti-frizz hairspray based on bamboo extracts.

For maximum holding power, Marlies Möller (Beiersdorf) has just launched Essential Creative Fibre Gum which offers an extra strength hold with a natural finish. Essential Funky Matt Paste offers strong holding power with an ultra matte look for tousled styling without limits, according to the company. Polyswing by Schwarzkopf & Henkel meanwhile has extended its Power Gel line to include a level eight maximum holding power. Gel MaXX Power lasts for up to 24 hours leaving no residue on the hair. Laboratorios Genesse has four new hairspray skus – for wavy hair, for damaged hair, for dry hair and for heat protection as well as maximum strength gel Giorgi Control Total Hold X-Trema which is said to be sweat and water-resistant.

As long as Spanish consumers continue to feel the pinch of the recession, spending on non essential hair styling products will be severely limited. Value-added products where consumers get more bang for their buck, not only for styling purposes but also for their nutritive, protective and specific benefits, are likely to drive sales at the top end of the market going forwards. Meanwhile, competitive own label brands by large distributors are likely to continue to gain market share from the middle to lower end brands that cannot compete on the price or the quality that own label brands now offer.

UK

Set for a fall

Unfortunately for hair styling manufacturers

across the UK, consumers are being urged through the media and hair magazines to go for the natural look when it comes to their hair and this is to the detriment of the styling market. UK consumers are taking the natural look and making it a staple hair style trend, leaving styling products in their wake as a result.

This has been reflected in sales results for the hair styling sector in the UK, with total year-on-year sales down 2.1% from £257.382m, in the 52 weeks ending 15 June 2008, to £251.895m in the comparable period for 2009. Volume in units also dropped by 3.5% falling from 131.349m units in 2008 to 126.690m units in 2009. Although much of it can be blamed on the desire for natural hair, the recession will no doubt have had an additional impact when it came to the downturn in sales.

According to the category insights team from hair styling manufacturer Alberto Culver, the desire for natural definitely had a hand in the sales fall, especially in the female market: "We have seen usage of styling products amongst women decline due to a growing trend for natural hair amongst the female population. More education is required in this category so that women understand how to use styling products differently to achieve that natural look more efficiently."

It seems the hard times have hit almost all of the UK's hair styling categories. However, according to TNS Worldpanel, the frequency of use for hair styling products (4.1 times per week) actually trumps that of shampoos and conditioners, which stand at 3.4 and 2.8 times per week respectively.

Only two sub-sectors actually posted any year-on-year sales growth and that was aerosols and styling waxes/creams. Indeed it was the styling waxes/cream sector that enjoyed the most sales success, with an increase of 8.2%. However, despite this increase in sales and an increase in its overall market share (moving up from 12.7% to 14%) it was still hairsprays that took the lion's share of the sector at 36.2%, also posting a 1.2%

UK: Total hair styling sales

	52 w/e 15 Jun 08	52 w/e 14 Jun 09	%+/-
Value (£m)	257.382	251.895	-2.1
Volume (units)	131.349	126.690	-3.5

Source: *TNS Worldpanel*

UK: Top ten retailers 2009

Tesco
Boots
Superdrug
Sainsbury's
Asda
Morrisons
Wilkinson
Lidl
The Co-Operative
Waitrose

Source: TNS Worldpanel



sales increase. Following hairsprays in the market share breakdown were setting sprays at 17%, which were 0.2% down on the previous year and saw a sales hit of 3.5%. Next was the aforementioned styling waxes/creams, followed by styling mousses at a 12.9% share and then styling gels – which saw a market share fall from 13.5% to 12.2% and a sales decrease of 11.8%. The category hit the hardest was men's hairdressing, which lost market share going from 7% to 5.8% and also experienced a large sales decrease of 19.1%.

Private label meanwhile fell short in market share last year, seeing a 91.8%/8.2% split in favour of branded products, with both posting year-on-year sales decreases.

Spray on style

Kicking off his first foray into the UK hairspray market, Kevin Murphy launched his new Session Spray at the beginning of the year. The hairspray was developed around the concept of big hair is beautiful and is said to give hair added volume.

Also in the spray sector was the TRESemmé (Alberto Culver) Smooth Memory Straightening Spray that is designed for use with hairdryers to help create the ultimate straight look, said to last for up to five washes. The spray contains memory lock technology which is said to create a net around the hair shaft to lock the hair into a straight style. The product is recommended for use on damp hair in order to achieve the best results.

One key launch in the UK styling sector last year was the VO5 Weather Resistant range (Alberto Culver) with Climate Control Technology. The range comprises hairsprays, gel sprays and styling mousses, with all products offering protection from moisture with 24 hour humidity protection..

Styled to perfection

As the main reason for the use of styling products among men is to hold a style effectively, according to TNS Worldpanel, it seems that there is an obvious need for these types of products in the UK. And there were a variety of launches over the past year designed to cater for this.

Beiersdorf's Marlies Moller brand went for two different looks with its Essential Creative Fibre Gum and Essential Funky Matt Paste products. Both products are said to be able to style any length of hair and provide a strong, yet flexible, hold. Another hair styling brand, Philip Kinglsey also launched a holding gel, Texture and Hold. This product was designed for shorter hairstyles and features olive oil and castor oil, which are claimed to add shine and moisturising properties to the hair.

Also new in the waxes category are the additional products added to Alberto Balsam's New Look range (Alberto Culver). The new additions include the Styling Wax and Matt Effect Styling Paste, with the Styling Wax said to provide hold for consumers who want firm hold for unique styles. The wax is added to damp hair and creates more styled and groomed hair. The Matt Effect Styling Paste is said to create the messy look that is popular with many UK male consumers. The paste is used on damp or dry hair and does not leave any

sticky or greasy residue.

VO5 has had a good run over the past year with a few new male launches. The new Extreme Style Endurance Gel is said to hold any hairstyle and is said to allow hair to bounce back into shape even after being flattened with hoods, hats or helmets. The gel is also said to be humidity-resistant. The product can be used on damp hair or dry hair for more extreme looks.

A new gum line in the VO5 Extreme Style stable is the FunkyShaper gum, which has been accompanied by a heavy media advertising campaign. The gum is designed for use on both short and long hair and is said to give longer hair a semi-matt finish while focusing on layers in the hair. Meanwhile for short hair it is said to shape and mould the hair into a desirable style. The gum can be used on dry or damp hair.

Another addition to the VO5 Extreme Style range is the new Mane Tamer. Designed to add structure to longer hairstyles, the formulation is said to have the hold of a gel but with a cream feel in order to keep the hair smooth. The product is said to give longer hair effortlessly natural looks without making the hair feel sticky or stiff. The product also protects the hair from the effects of heat styling and humidity. The final two products in this range are the VO5 Extreme Style Spiked product and the SurfStyle product. The Spiked product is a water-resistant fixing glue that is said keep hair styled and spiked at all times. Whereas the SurfStyle product is more of a texturising spray and contains sea salt to give a messy, tousled look with added UV filters.

John Frieda (Kao) has gone into the styling

UK: Breakdown of hair care sector, 2008-2009, % share

	%	%	% +/-
Hairsprays	35.0	36.2	1.2
Men's hairdressing	7.0	5.8	-19.1
Gels	13.5	12.2	-11.8
Setting sprays	17.2	17.0	-3.5
Mousses	13.5	12.9	-6.6
Styling waxes/creams	12.7	14.0	8.2

Source: TNS Worldpanel

UK: Top ten hair styling ranges, 2009

Brand	Manufacturer
Silvikrin	L'Oréal
Elnett	L'Oréal
TRESemmé	Alberto Culver
Wella Shockwaves	L'Oréal
L'Oréal Studio	L'Oréal
Alberto VO5 Advance	Alberto Culver
Pantene	P&G
John Frieda Frizz-Ease	Kao
Brylcreem	Sara Lee
Alberto VO5 Extreme Style	Alberto Culver

Source: TNS Worldpanel

market all guns blazing this year with the launch of three new styling products. Targeted specifically at frizzy hair, the three new products are Frizz Ease Heat Defeat Protective Styling Spray, Frizz Ease Straight Fixation Smoothing Crème and Frizz Ease Spiral Style Curl-defining Spray Gel. The Straight Fixation Smoothing Crème is said to create a straight style that is similar to the effect achieved at the salon, while smoothing away any frizz. Formulated with a polymer system, the crème bends with the hair in order to create a longer lasting finish. The Spiral Style Curl-defining Spray Gel is said to give the weightless, non-sticky feel of a spritz while providing the level of hold more often associated with a gel.

A professional touch

Also going on in the UK styling market was the relaunch of the Sebastian brand, which is well known in the US and starting to make a name for itself more and more in the UK.

The brand was relaunched in April this year, offering key styling products that are said to offer a professional hold but at a reasonable price point. Products include Whipped Crème, which is the hero product of the range, said to give the hold of a mousse whilst having the caring aspects of a cream. This product is used to lift curls and define waves. Also in the Sebastian Professional stable is the Trilliant product, which is designed to give shine, body and heat protection to hair.

Proving sticky

Looking at the recent UK sales figures it is clear that hair styling has had a hard time of late, especially in comparison to fellow hair care products, which saw a turn of good fortune in the past year.

However, when looking at the sales drop the sector experienced last year in relation to 2007 (-8.1%), it seems the category is actually making improvements – not an easy task in the current

Weighing things up
 Alberto Culver's category insights team shares its observations on the UK hair styling sector

Who drives the sales of hair styling products, male or female consumers?
 We have found that both sexes continue to drive sales of our brands. TRESemmé is a 100% female styling range and sales are up 1.7%, with the brand seeing very strong growth from hairsprays in particular. VO5 meanwhile is a unisex styling range and the male products in the range are growing by 7% each year, whilst the female products are growing at a slightly slower rate of 1%.

Do hair trends affect the hair styling market?
 Definitely. We have seen the usage of hair styling products among women decline recently due to the growing trend for natural hair – and this trend is set to continue for some time to come.

How do you think the styling industry in this country will fare over the coming year and what are the big trends set to emerge?
 The UK hair styling market has been in decline for some time. However, the decline should begin to turn around soon as we see the launch of styling products that target more natural styles and offer heat protection benefits. Some of this year's key trends for volumised looks all require styling products, which is positive news for the category.



economic climate.

In fact, if manufacturers are savvy they could perhaps play the credit crisis to their advantage. With fewer consumers paying to get their hair styled at a salon they could start to look to the next best thing for them to take advantage of – high street brands. And if there are good enough alternatives consumers may think twice about future salon visits.

US Holding firm

Cash strapped US consumers are making fewer trips to the salons and department stores in favour of shopping in mass market chains for their hair styling products. Despite the move to mass, women still expect their gels and sprays to lift, smooth and keep their hair in place.

With economising in vogue, it's no wonder that department store sales of hair styling products

have waned. According to The NPD Group, sales of hair styling products in US department stores slipped by 9% last year to just \$10.4m. By contrast, hair styling product sales rose by 1.4% to \$1.05bn in US supermarkets, drugstores and mass merchandisers, excluding Wal-Mart, for the year ended 22 February 2009, according to Information Resources Inc Chicago. Sales of hairsprays and spritzes increased by 1.37% to \$411.8m, while sales of gels and mousses dropped by 2.76% to \$629m, according to IRI.

Men make their move

With brands like American Crew (Colomer) cracking the top ten lists over here, it's clear that male interest in hair styling products is on the rise. "Men want their hair to look natural and they are not into the excessively product-laden or shiny look, but favour products that bring out the natural texture and shine in their hair," explains Paul Wilson, artistic director for American Crew.

According to Wilson, American Crew's Molding Clay enables men to achieve that natural look



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since it “helps maintain touchable shape and texture and has a natural, subtle fragrance”. New from American Crew is Grooming Spray, a variable hold finishing spray, and Firm Hold Styling Gel, which is enriched with natural extracts to help hair look thicker with added shine.

Got2b (Schwarzkopf & Henkel) meanwhile says its new Magnetik line is the first men’s hair styling collection with female-attracting pheromones. The collection is infused with a synthesis of the male human pheromone androstadienone, proven to have a positive effect on a woman’s mood. Each product contains tiny bead filled pheromones that burst during application. The line includes a styling gel, pomade and cream.

Axe (Unilever) is another brand that plays on male desire to attract the opposite sex. Axe entered the hair styling market this year with the Axe Hair for men, which promises to help a guy get the girl as well as making his hair look great.

“Our products are based on the consumer insight that guys keep well groomed to get the girl,” says David Rubin, marketing director for the brand. Axe’s line-up includes Messy Look Paste, which gives locks a tousled look; Spiked-Up Look Putty, that offers hold without the crunch of gel; and Clean-Cut Look Pomade for a polished finish.

In June L’Oréal Professionnel rolled out its Homme collection into US salons. Each product is custom-measured with the exact specifications of styling polymers, hydrating humectants, grooming emollients and shine agents to deliver targeted and effective results, according to the company.

Female focus

Mintel forecasts that US hair styling product sales will rise by 11% from 2007 to 2012 to reach \$2.3bn. Leading the way of course, are styling products aimed at women. To meet with ever changing fashion trends, marketers are rolling out an array of sprays, spritzes, pastes and gels to appeal to women.

TRESemmé rolled out its new 24 Hour Body Collection, a series of salon quality products formulated to retain a voluminous style all day, according to the company. The collection features Volume Control Complex, a blend of polymers that block humidity, allow hair to retain a style and hold body for up to 24 hours, according to the company.

Redken (L’Oréal) recently launched its Layer Lift 07, a spray gel that adds volume to layered locks while helping to prevent flatness and frizz, according to the company. The product’s new Clean-Feel Technology creates non-sticky style manipulation and anti-frizz control in the form of a lightweight non aerosol spray.

Big hair is also the main idea behind Pureology’s (L’Oréal) new PureVolume Thickening Mist, a lightweight, alcohol-free spray that infuses hair with volume, texture and shine while keeping colour vibrant at the same time. It contains organic botanics of lemongrass, papaya and ginseng, while an anti-fade complex maximises colour retention.

US: Top ten hairspray/spritz brands 2008

Brand	Manufacturer	\$m
TRESemmé Tres Two	Alberto Culver	39.6
Suave Naturals	Unilever	25.3
Salon Grafix	Continental	19.7
Sebastain Shaper	Sebastain	15.7
Dove Hair	Unilever	14.0
Aquanet	Lornamead	10.3
Alberto Consort	Alberto Culver	9.9
Rave	Rave	9.1
Big Sexy Hair	Big Sexy Hair	9.0
Aussie Instant Freeze	P&G	8.3

Source: IRI Chicago

US: Top ten setting gel/mousse brands, 2008

Brand	Manufacturer	\$m
American Crew	Colomer	26.6
Got2b Glued	Schwarzkopf & Henkel	19.4
John Frieda Frizz-Ease	Kao	13.7
Garnier Fructis Style	L’Oréal	13.1
LA Looks	Schwarzkopf & Henkel	12.5
Pantene Pro V style Curl	P&G	10.8
TRESemmé Flawless Curls	Alberto Culver	9.8
Clairol Totally Twisted	P&G	9.5
TRESemmé Thermal	Alberto Culver	8.9
Got2b Hair Styling	Schwarzkopf & Henkel	7.7

Source: IRI Chicago

Meanwhile, John Frieda (Kao) is expanding its Frizz-Ease line with three new styling aids that go beyond frizz fighting and address specific styling concerns for each hair type, according to the company. The new formulas provide solutions for heat styling, straightening and curl defining that also prevent and calm frizz, ensuring smooth, flawless, lasting styles. One of them, Frizz-Ease Heat Defeat, is a protective styling spray which is designed to work with heat tools to smooth, straighten and condition the hair. And all products contain the brand’s Therma Guard Complex to help protect hair from the damage caused by heat.

What’s ahead?

Getting shiny, healthy hair that’s easy to achieve and maintain, remains the primary goal of US consumers. To get there, marketers are rolling out combination products packed with natural ingredients which are always popular.

Sean Patrick Harrington, senior director of marketing, Pureology, adds that another top trend at the moment is heat styling protection. “In 2010 and beyond, consumers and professional alike will look for products, such as Pureology Stylers, that

include thermal protection or heat resistant barriers to protect against hot tool use," he comments.

Meanwhile, simplicity also remains a key driver. "The trend to go back to basics is very popular as everyone wants natural, healthy, beautiful looking hair," says Peter Coppola, chairman of hair styling

manufacturer Coppola. "When you use the right products on your hair, you can have fabulous looking hair every day."

Fabulous hair can be achieved with easy to use styling products which are priced correctly. Experts agree that this will hold sway in the US hair styling market for years to come.

Russia Shaping up well

Almost half of all Russian women today in the 16-44 age group apply styling products to their hair. In 2008, the styling segment demonstrated a certain maturing as young women of 16-34 years old ceded their share to older consumers in the 35-65 age group. The most significant growth was demonstrated by the 45-54 year old category which increased in size by 8.1% last year, according to Comcon Pharma.

Each year the number of people who use styling products is growing and since 2005 the number of Russian consumers using styling products has grown by 4.5%. Several decades ago this sector was not developed enough but now Russians can choose from an array of innovative formulas and an abundance of hair styling products. Manufacturers are doing their best to satisfy the increasingly sophisticated consumer by launching innovative styling products packed with protective and organic ingredients. Recently launched hair styling lines include several hairsprays, mousses, gels and other formats with different levels of hold. Product lines in Russia are structured according to the styling result – hair volume, texture and shape, hold and shine are all factors which come into play.

Maintaining its hold

Hairsprays remain the most popular styling format in Russia. In 2008 the number of hairspray users in the country increased from 25.5% to 27.4%.

Russia: Hair styling consumption by format, % share

	2005	2006	2007	2008
Styling products	32.6	34.6	32.7	37.1
Hairsprays	25.3	25.5	25.5	27.4
Foams/mousses	23.2	24.5	24.2	25.9
Gels	12.1	11.1	10.3	10.4
Waxes	5.5	5.6	5.5	5.7

Source: Comcon Pharma

Russia: Female hair styling consumption by age group, % share

Age group	2007	2008
16-19	9.6	8.1
20-24	16.3	15.7
25-34	21.4	20.1
35-44	22.8	22.6
45-54	16.9	18.8
55-64	8.0	8.3
65+	4.9	6.4

Source: Comcon Pharma

Russia: Hair styling consumption by brand, % share

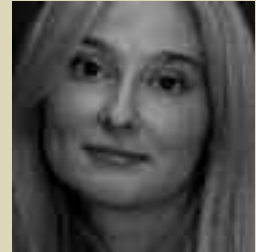
Brand	Manufacturer	2007	2008
Taft Three Weather	Schwarzkopf & Henkel	24.0	22.1
Taft	Schwarzkopf & Henkel	22.9	21.1
Prelest	Arnest	21.6	20.3
Avon	Avon	13.2	15.9
Gliss Kur	Schwarzkopf & Henkel	10.3	13.8
Wellaflex	P&G	14.4	13.6
Sunsilk	Unilever	13.8	11.8
Prelest Bio	Arnest	11.8	11.6
Fructis	L'Oréal	7.4	11.3
Oriflame	Oriflame	9.1	8.8
Taft Express	Schwarzkopf & Henkel	9.2	8.0
Pantene Pro V	P&G	8.8	7.6
Chistaya Linia	Kalina	5.4	7.0
Faberlic	Faberlic	3.9	5.6
Wella Design	P&G	5.0	5.6

Source: Comcon Pharma

Foams and mousses were next in line reporting a 25.9% market share. In contrast, gels and waxes are waning in popularity in Russia and to prove this point gel consumption has decreased from 12.1% to 10.4% in the past four years. Meanwhile styling waxes are used only by 5.7% of Russian consumers, and this amount hasn't changed since 2005.

The most popular styling format sizes in Russia, according to AC Nielsen, are 250ml, 200ml and 150ml. Strong and extra strong hold products enjoy the most popularity holding a 45.4% volume and 37.9% value share and 43% volume and 49.2% value share respectively.

When it comes to the most popular brands, poll position is held by Taft Three Weather (Schwarzkopf & Henkel), which enjoy the highest recognition and consumption rate in Russia at



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43.3%. Russian brand Prelest (Arnest) follows Taft in popularity taking 20.3% of the market share. However, these brands together with Sunsilk (Unilever) and Pantene Pro V (P&G) all reported lower consumption rates in 2008, giving way to Avon, Gliss Kur (Schwarzkopf & Henkel) and Fructis (L'Oréal) which have reported good growth of late thanks to aggressive advertising and extensive promotional campaigns. The Russian brands Chistaya Linia (Kalina) and Faberlic have reported some positive growth in the past year as the domestic market holds its own.

Securing a foothold

It is clear that multinational companies have a firm grip on the Russian hair styling market but local players are retaining solid sales, particularly in the hairspray category. Arnest, the leading Russian manufacturer of aerosol and household chemical goods products, expanded its brand portfolio by the acquisition of another competitor company – Garmonia Plus – earlier this year. The company

manufactures the popular Garmonia and Antourage styling brands. This means that Arnest now controls five styling product brands, the most popular of which are Prelest with Prelest Bio, Prelest Classic and Prelest Professional.

According to AC Nielsen, Prelest and OWK's brands together held around 27% of the Russian market share in this category in 2007. By taking control of the Antourage brand, which covers about 7% of the Russian styling market, the share of Arnest as a company has increased considerably and means it can be competitively priced when it comes to taking on the multinational brands. Another chance for Arnest's potential prosperity is customers switching to cheaper products. According to research conducted by Comcon Pharma in November last year, almost 28% of consumers have started cutting back on what they spend on hair care and hair styling products and 7% have already switched to cheaper brands. If this trend continues, this will only benefit the domestic market in the long term.

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Brazil Uncertain and unravelling

Brazil is one of the fastest growing C&T

markets globally and hair plays an important role in this regard. Apart from being the largest segment in Brazil's overall C&T market, hair care products post continuously high growth rates and there is no indication of it slowing down in years to come.

According to The Kline Group Brazil, hair care sales increased at a rate of 14.1% between 2003 and 2008, above the industry average of 13.5% – totaling BRL8.1bn in 2008. The product categories driving this result include hair colouring products and conditioners, which together represent approximately 70% of this market.

Hair styling products and sprays on the other hand represent just 2% of hair sales in Brazil, which equated to BRL136.3m in 2008, and was in fact the only product category with declining sales in the same period. There are several reasons for this negative result but this does not mean that opportunities cannot be seized in this market.

The importance of grooming

Brazilian consumers, especially women, have a very special relationship with their hair as they consider hair styling as one of the fastest options to achieve a well groomed look. For Brazilians, the hair shows off an individual's personality and is tightly

connected to the concept of beauty. Brazilian women take enormous interest in maintaining the beauty and youthfulness of their hair but face constant natural, mechanic and chemical aggressors in their day to day lives.

Brazilians are very keen on using beaches and swimming pools as a means to cool down in Brazil's warm climate and sunny weather. Indeed, the country is almost entirely located in the tropical region where the hot weather lasts for the whole year. This means that Brazilian hair is continuously exposed to damaging factors such as wind, sea water, sun and chlorine. In addition, the proliferation of chemical process, such as hair colouring and straightening, coupled with the constant use of blowdryers, straighteners and curling irons on an almost daily basis, means that the hair is undergoing further harm.

This leads Brazilian women to have increasing concern about their hair's appearance resulting in a continuous search for products to help maintain the healthiest hair possible. Traditional hair styling products are not seen as good enough at delivering the treatment which Brazilians currently require and therefore they are losing space to other products in the market, such as leave-in conditioners for example.

Treatment products which promise to restore and maintain the smoothness of the hair and multifunctional products, which offer additional styling benefits such as curling or straightening, have increased Brazilian consumers' options for hair styling and have blurred the boundaries between the treatment and styling categories.

The natural look

Brazilians in general prefer natural looking hairstyles, thus strong hold products and items which make the hair look preened and over-styled are not in much demand these days, undermining hair styling products sales as results show.

Instead, Brazilian consumers demand treatment products that enhance their hair's natural potential

but which offer added benefits such as shine and curl definition. As a result, hair styling marketers have seen some cannibalisation in the conditioner category and this has had an effect on them.

Hair straightening products have also reduced the demand for hair styling products of late. These products are hugely in demand by Brazilians as straight hair is extremely fashionable and the population prefers to style its hair in this way, according to trend forecasters. Getting straight hair through chemical processes drastically reduces the need for styling products as the results of such procedures last for several weeks and therefore a negative impact on hair styling sales was only to be expected.

Apportioning blame

Manufacturers and retailers are also accountable for the poor results of the Brazilian hair styling industry. Little promotion and minimal new product activity, especially when compared to other C&T categories, has resulted in understandably less interest from consumers and this has contributed to the downsizing of the presence of hair styling products on retailers' shelves. Hairsprays and mousses, which currently represent the bulk of hair styling products sales in Brazil, are seen as products belonging to an older generation and are avoided by young consumers to a certain extent.

The consolidation of the Brazilian C&T market could be one of the reasons for such inertia – the five leading companies' combined sales account for 77% of the category and include global players such as L'Oréal and Procter & Gamble as well as domestic companies such as Bertin, which owns one of the main hairspray brands in Brazil. It also includes Hypermarchas, which became the leading Brazilian company in 2008, taking nearly 30% of the market after the acquisition of Bozzano and NYLOOKS, two of the most important gel and mousse brands in the country.

Seizing the opportunity

There are still many untapped opportunities in the Brazilian C&T market which, if explored properly, will certainly drive growth for companies in this segment. Hair styling products with treatment features should leverage sales when they are launched. Multifunctional hair styling products should help to drive up sales, because in addition to styling, they offer other benefits such as added shine, protection from styling appliances and improved texture.

Natural ingredients represent another opportunity for all Brazilian C&T product categories, specifically for hair styling products, which still contain large concentrations of synthetic ingredients. However, as an alternative to the difficult task of including natural ingredients to go into hair styling products, the product could simply be inspired by nature, meaning that the product uses both synthetic and natural ingredients, but still enabling a natural positioning on the shelf which gives it added appeal.

There is also an opportunity to focus on the men's sector when it comes to hair styling and this

is a largely untapped market in Brazil. Men are more worried about their appearance these days than ever and are really taking care of their hair styling needs. The metrosexual trend is slowly but surely becoming popular in Brazil and illustrates how successful this market could become. Brazilian men tend to rely on gels, pomades and waxes when it comes to hair styling and many of them wear their hair short so this also limits how many styles than can have.

Salon selective

The salon channel, although small if compared to the overall market, is rapidly expanding. This illustrates Brazilians' increasing preference for more sophisticated and tailor-made styling products, which are sold exclusively through the professional salon channel. Shifting to more focused retailing options, such as specialised stores and salons, is a good strategy to reach those consumers who are more inclined to buy hair styling products when they have just had their hair done or had a treatment in the store or salon.

A flat forecast

The Kline Group's forecast indicates that hair styling sales in Brazil are projected to grow by just 0.2% from BRL136m to BRL138m from now until 2013. Worryingly, it seems that many factors are predicted to be against the category gaining in strength, according to industry experts.

Hair straightening is set to remain the preferred styling trend among Brazilian women, driving sales to this category rather than that of hair styling. Treatment products, with styling benefits such as leave-in conditioners will continue to grow and will represent continuing competition for hair styling products. What's more, young consumers, who will drive growth in the C&T industry in the next few years, are not big fans of the hair styling products currently available in the market and, unless innovative launches come to market soon, this situation is unlikely to change.

The hair styling category is also affected largely by the financial position in which consumers find themselves. However, the global economic crisis which started to take hold last year has not yet caused too big an impact in this sector in Brazil, rather it has affected larger purchases such as cars and household appliances.

However, future uncertainties surrounding employment and income will slow down the market in the long term as consumers in general become more cautious and choose lower priced products rather than premium ones and this will definitely apply to the hair styling sector.

Being sensitive about what consumers want for their hair in terms of appearance and stressing how the benefits of the products meet consumer expectations will be crucial to surviving in this market. However, luring new users by adding more benefits than simple holding ability and increasing consumer awareness of the products are possible ways to grow the sector as a whole. Marketers will be able to achieve this if more effort is put into marketing and distribution activities – then the benefits can really be reaped.



Care Liss is one of Brazil's most popular styling brands