

What is stimulating the hair salon industry?

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Over 3% global growth and the strong performance of some regions, particularly North America, are proof of another good year for the salon hair care market. Some of the most interesting developments happen on the competitive front where the race for higher shares in the quickly growing bond builders segment is intensifying due to the emergence of new brands. Olaplex, the pioneer in this segment, continues its efforts to remain the leader, not only through expansion, but also through legal action towards its competitors.

Market consolidation continues to shape the industry with two recent acquisitions—Conair adds Aquage to its portfolio and Unilever purchases Living Proof. It is an important step for Unilever, which competed only with one master brand, TIGI, in the professional hair care arena. Unlike TIGI, which takes pride in being a brand “by hairdressers for hairdressers,” Living Proof is a hybrid brand with strong distribution in both salons and retail.

Recently, another factor behind the salon hair care market’s growth has been the brands and products dedicated to barbers. The expansion of many British and American brands, as well as the launch of new brands and product lines, especially in Europe, have helped the men’s products segment to increase by almost 8% in 2015. The success of these brands and products stems largely from design and marketing efforts adapted for a masculine audience. The same applies when it comes to the development of barbershops, which attract men with unique looks and services, usually not found in classical hair salons.

In parallel to fierce competition and male-centric hair products, professional hair tools and appliances for use in salons, a segment where technology is key, is also showing promising signs with innovation geared towards the same goals as salon hair care products: healthier, better managed



hair. These tools are moving away from hair-damaging technologies and come up with new technology that promises to condition, repair, and/or smooth hair. A recent example of such innovation is the smart brush launched by Kérastase called Kérastase Hair Coach. The hair care brand pairs up with Withings to create a device that collects data when one brushes his/her hair and shows it on a smartphone. Another example is Dyson’s Supersonic Hair Dryer. The appliance is smaller and lighter in weight than most dryers and makes less noise. One of its key claims is that it helps prevent extreme heat damage to protect hair’s natural shine. In order to keep the temperature under control, its temperature is measured 20 times every second.

Asia perspective

The markets in Asia have also had their own growth drivers and areas of innovation over the past few years. In many ways, India follows western market trends with salon brands consequently making their way into this market, which is becoming more structured with an increase in salon doors accommodating professional brands from

L’Oréal or Coty. Other key Asian markets do not necessarily follow the same pattern with unique trends, salon services, and competitive landscape. China, South Korea, and Japan stand out from the global salon hair care map.

Bond builders have been making a huge impact in other markets, boosting growth and encouraging men and women to try different hair colours, especially shades of light blonde and bright colours requiring hair bleaching. However, Asian markets have resisted welcoming this product segment in their hair salons, with many claiming that these products “are not suitable for Asian hair.”

Scalp care

In the meantime, scalp care has been expanding both in terms of product sales and services available in salons. Many companies, particularly from Japan, are considered benchmarks when it comes to innovation in scalp care. Shiseido Professional’s Adenovital is viewed as one of most innovative product lines in scalp care. As scalp care has been a hot topic in other countries too, Kline tracks this dynamic segment, showing over 10% growth globally in both the 2015 and 2016 editions of our Salon Hair Care Global Series.

Comprehensive reports

We will continue to take this market’s pulse through our complete market research trio—Salon Hair Care Global Series, Barbershops: Global Market Brief, and Professional Hair Tools and Appliances: Global Market Analysis and Opportunities. These reports are expected to be published this spring and summer. These comprehensive reports will offer deep insights into the popular topics in the professional hair care area, as well as reveal the performance of the various interesting markets and segments, key growth factors, latest trends, and product launches, among other issues.

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