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The U.S. Hair Styling Products Market

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INTRODUCTION

The U.S. hair styling products market grew 21% (dollar sales at current prices) through food stores, drug stores and mass merchandisers from 1997 to 2002, excluding inflationary effects, which equates to 6% real growth.

The market is a highly fragmented one, with growth being driven by new product introductions in both the major segments—gel and mousse, and hair spray—though innovations in gels and mousse have far outpaced those seen in the declining hair spray segment.

This Mintel report explores the following hypothesis: the market for hair styling products, while mature, has sectors with strong growth potential. The main potential for growth is to be found in styling and care products aimed toward specific demographics, including the ethnic hair care market and the youth market. Market growth for older, more traditional hair styling products, such as hair spray, may continue to slow among younger consumers unless manufacturers can offer compelling reasons to purchase this product, which is increasingly seen as outdated.

OTHER RELEVANT REPORTS

Mintel has a number of U.S. consumer intelligence reports covering other sectors of interest that have been published, are planned or are in preparation. Please contact Mintel for details.

- *Black Hair Care, consumer intelligence—U.S. Report, June 2003*
- *Black Skin Care, consumer intelligence—U.S. Report, April 2003*
- *Suncare, consumer intelligence—U.S. Report, April 2003*
- *Shampoos & Conditioners, consumer intelligence—U.S. Report, February 2003*
- *Home Beauty Equipment, consumer intelligence—U.S. Report, November 2002*
- *Day Spas, consumer intelligence—U.S. Report, October 2002*
- *Body Care, consumer intelligence—U.S. Report, July 2002*
- *Deodorants & Antiperspirants, consumer intelligence—U.S. Report, March 2002*
- *Hair Styling Appliances, consumer intelligence—U.S. Report, February 2002*
- *Men's Toiletries, consumer intelligence—U.S. Report, November 2001*
- *Makeup, consumer intelligence—U.S. Report, October 2001*
- *Women's Magazines, consumer intelligence—U.S. Report, May 2001.*

In addition, Mintel has published a number of reports on the UK market that may be of interest:

- *Hair Salon Products, Market Intelligence—UK Report, September 2002*
- *Make-up, Market Intelligence—UK Report, August 2002*
- *Hair Colourants and Home Perms, Market Intelligence—UK Report, February 2002*
- *Hairstyling Products, Market Intelligence—UK Report, December 2001*

- *Shampoos and Conditioners, Market Intelligence—UK Report, June 2001*
- *Women's Bodycare Products, Market Intelligence—UK Report, April 2001*
- *Electrical Hair Appliances, Market Intelligence—UK Report, January 2001*
- *Health and Beauty Retailing, Retail Intelligence—European Reports, October 2001*
- *Hair Salon Products, Market Intelligence—UK Report, September 2000*
- *Toiletries and Cosmetics Retailing, Retail Intelligence—UK Report, May 2000*
- *Black Beauty Products, Market Intelligence—UK Report, November 1999.*

DEFINITION

This report covers the following hair styling products sold through retail channels for consumer use:

- Hair spray and spritz
- Styling gel and mousse
- Setting/wrap lotions
- Pomades and waxes
- Scalp oils/hair dressings
- Anti-frizz serums

but does not include:

- Shampoos
- Conditioners
- Hair growth products
- Hair accessories

While products may be purchased through salons and other non-retail locations, this report does not include products for use by professionals.

Value figures throughout this report are at retail selling prices (rsp) excluding sales tax unless otherwise stated.

ABBREVIATIONS

There follows a list of abbreviations used in this report.

CPG	Consumer Packaged Goods
CPI	Consumer Price Index
FDA	Food and Drug Administration, U.S. Government
FDM	Food, Drug and Mass Merchandisers
GNPD	Global New Products Database
HAPPI	Household and Personal Products Industry
ICR	International Communications Research, Inc.
IRI	Information Resources Inc.
NCS	National Consumer Survey (Simmons)
P&G	Procter and Gamble
NPD	New product development
AHA	Alpha hydroxy
UVA	Ultraviolet A
UVB	Ultraviolet B

EXECUTIVE SUMMARY

SHIFTING DEMOGRAPHICS DRIVE THE MARKET

The shifting composition of the key consumer group—women—will continue to have the greatest impact on the hair styling products market. According to the U.S. Census Bureau, the number of women aged 45-64 will increase by over 9 million through 2010, while the number of women aged 18-24 will decrease by nearly 1.4 million. So older women present the largest target market, but sales are being driven by gels, mousses and other new age forms of products that are more popular with younger consumers. Manufacturers may need to diversify their offerings in the near future and promote products that appeal to both groups.

The growing minority population is also having a significant impact on the styling products market. Growth in the Hispanic and black female populations—expected to bring 6 million new customers to the market by 2010—as well as the higher-than-average amounts that both groups spend on personal care products makes the unique needs of each group important to marketers looking to gain or keep their business. Hispanic consumers, though their hair care needs may be similar to those of whites, are reported to use these products more regularly than their white counterparts and thus will shop more often for them. Black consumers, on the other hand, with distinct differences in hair type, will prompt large manufacturers to continue to acquire smaller black-owned companies or conduct further product research to offer products to meet their needs.

STYLING PRODUCTS OVERTAKE HAIR SPRAYS

Traditionally dominant, hair sprays are no longer the largest sector within the total styling products market, with sales of $403 million, a decline of 4% between 1997 and 2002. This is partly because many consumers have turned to a range of other styling products, sales of which have grown by 54% to reach $547 million over the same period. In contrast to hair spray, styling products have benefited from continuous new product development, including the launch of several new ranges and the increased popularity of existing ones. Schwarzkopf & Dep, Inc., for example, relaunched its classic Dep hair care line to include products with herbal extracts.

THE LEADING COMPANIES ARE MULTINATIONALS

The major players in the hair styling products market are multinational companies, such as Helene Curtis, Procter & Gamble, L'Oréal and Clairol. Though Helene Curtis commands the largest share of the styling products market (13%) by value in 2001, followed by Procter & Gamble with nearly 11%, all companies have invested strongly in the styling sector in terms of new product development (NPD) and the market remains highly competitive.

Helene Curtis (13.1%) also leads Procter & Gamble (12.6%) for dominance in the gels and mousses category. It is also number one in the hair spray sector (19.9%) with its Suave, Salon

Selectives, and Thermasilk brands. Chesebrough-Pond's holds second place in hair spray (14.7%) with its Rave brand.

Both segments, however, are highly fragmented, with the remainder of sales split among numerous smaller companies.

NEW PRODUCT NUMBERS RISING SWIFTLY

The number of new hair styling product introductions has risen sharply, from 172 in 2000 to 373 as of October 2002, an increase of 117%. Trends prevalent in new products include the following:

- products specifically designed for various hair types like curly hair, straight hair, blond hair, etc.
- more transparent technology in product positioning, with a clear statement of what product ingredients are and what benefits they give
- a focus on caring for hair, including products that moisturize, condition or protect while they provide hold or shine, for example.

SUPERMARKETS HOLD LARGEST SHARE

With 41% share, supermarkets account for the largest share of hair styling product sales, but drug stores are not far behind at 39% and have grown at a much higher rate from 2000 to 2002—9.2% vs. 3.3% for supermarkets. Mass merchandisers are also growing steadily, rising 8.5% to capture the remaining 20% of the market in 2002.

CONSUMER FOCUS ON BRANDING, THE NATURAL LOOK AND FASHION

Mintel's exclusive consumer research reveals that the brand of hairstyling product is an important purchase consideration for many consumers, with 21% of respondents saying that brand name is most important to them. This suggests a significant degree of consumer loyalty with regard to hair styling aids.

A concern for suppliers will be the finding that over one-fifth (21%) of consumers do not use any type of styling products as they prefer a natural look.

The most experimental users of styling products are consumers aged 34 and under. Indeed, these are the most important target for most of the brands and products recently launched. Although older consumers are arguably less interested in fashion and novelty, they could still be targeted with products for their specific hair styling requirements, particularly innovations in hair spray. Hair spray was cited as the product most popular among users aged 55 and above.

THE CONSUMER—WHO'S USING?

Mintel's exclusively commissioned research found that some 79% of women surveyed use at least one hair styling product, with hair spray being most popular (51%), followed by gel/mousse (36%). Income and geographic region appear to be the most significant demographic factors among female respondents, as those with higher income and those located in the Northeast and South more likely than others to report that they use these products.

Only 28% of mean surveyed say they use any of the products—15% say they use gel or mousse and 12% use hair spray. Differences are most apparent by age, with the youngest men, those aged 18-24, being most likely to say they use any products—41% vs. 28% of all male respondents.

MASS MERCHANDISERS POPULAR, BUT BEAUTY SUPPLY NOT FAR BEHIND

A third of female respondents to Mintel's survey report that they shop mass merchandisers for their hair styling products, while nearly equal percentages say they shop at beauty supply stores (20%) and drug stores (19%). The fact that a fifth of respondents say they shop beauty supply stores is significant as these women must choose to go to these stores specifically to buy styling products, while they may normally shop mass merchandisers and drug stores for other products and incidentally purchase styling products there. It is also significant as many of the products available in traditional FDM outlets (the products covered by this report) are not found in beauty supply stores.

PRICE ISN'T EVERYTHING

When asked what factor is most important in choosing a hair styling product, a quarter of female respondents cited price, but equally high percentages of women also cited product claims (23%) and brand name (21%).

An additional 17% say that ingredients, esp. natural or organic, are the determining factor when they shop, which supports the move by many manufacturers to explain on their packaging as well as in their marketing materials what their products do and how they work.

In terms of how respondents typically shop for their products, 85% say they buy products specifically designed for their hair type and 72% say they stick to the same brands.

THE FUTURE—KEEPING UP WITH TRENDS

Market growth will come from new product development, with associated further usage and added value. Most NPD will emanate from smaller, niche hair care ranges, although the leading brands will also continue to innovate, particularly in segments such as ethnic hair care. Hair spray will continue to decline but will remain popular among its core market of older consumers, who are not seeking new product innovation as eagerly as their younger counterparts.

Overall, the hair styling products market is expected to rise 10% at current prices through 2007, but only 3% at constant prices. Market growth will be driven by the gel and mousse segment, which will continue to be fuelled by an endless number of product form and function innovations and is expected to rise some 20% at current prices (6% at constant prices) from 2002-2007.

Market gains will be tempered by the decline of hair sprays, however, which will drop 4% at current prices and 15% at constant prices through 2007.

MARKET DRIVERS

The Market Drivers section identifies the principal factors that affect the hair styling products market. These factors may have either a positive or negative influence.

CHANGING DEMOGRAPHICS

The main external market driver for the hair styling products industry is the changing U.S. demographic. Changes in the structure of the population have led to different targeting opportunities which some hair care manufacturers are recognizing and addressing. Most hairstyling product initiatives are aimed at two groups: younger consumers (teens and young adults) who take a greater interest in frequent hairstyle changes and like to experiment with new product formats; and specific ethnic groups who have particular hair care and hair styling needs. These specific drivers are explained in greater detail below.

The female population

Though more products specifically designed for men are coming onto the market, clearly the most significant driver of the hair styling products market is the size of the female population, as any shift in this crucial target market will affect the types of products demanded. Figure 1 details projected growth of the female population through 2010.

Figure 1 Female population projections, by age, 2000-2010

	2000		2005		2010		Change 2000-2005	Change 2005-2010
Age	000	%	000	%	000	%	000	000
<18	35,235	24.6	34,950	23.8	35,190	23.0	-285	240
18-24	13,270	9.3	13,956	9.5	14,774	9.6	686	818
25-34	19,771	13.8	18,643	12.7	19,565	12.8	-1,128	922
35-44	22,701	15.8	21,567	14.7	19,993	13.1	-1,134	-1,574
45-54	19,181	13.4	21,347	14.5	22,455	14.7	2,166	1,108
55-64	12,629	8.8	15,503	10.5	18,457	12.0	2,874	2,954
65+	20,582	14.4	21,052	14.3	22,749	14.9	470	1,697
Total	**143,368**	**100.0**	**147,018**	**100.0**	**153,183**	**100.0**	**3,649**	**6,165**

Source: U.S. Census Bureau Population Projections/ Mintel

Overall, the female population is set to rise some 2.5% from 2000 to 2005, and by 4.2% from 2005 to 2010 (not tabulated), but the shifts within key age groups will have the greatest impact on the market. According to the U.S. Census Bureau, over the period 2000-2010, the number of women aged 45-64 will increase by over 9 million. This growth far outpaces that seen among their younger counterparts, which, combined, will decrease by approximately 1.4 million over the same period.

So while many of the new products introduced to the market (and the accompanying advertising) target the young consumer, it is the older female consumer that is increasing in numbers. Marketers seeking to grow their markets will need to focus on the needs of this consumer and either alter their advertising or the positioning of their products to attract older females.

With little growth in the numbers of younger women, and a short term decline in under 18s, any growth from this end of the age spectrum will have to come from increasing usage and added value of product.

Teen growth and spending power

According to the U.S. Census Bureau, in the period 2000-2005 there will be a 3.6% (c.726,000 people) increase in 10-14 year olds, the age at which Mintel would expect consumers to make their first hair styling product purchase. Figure 2 details this expected shift.

Figure 2 U.S. child, teen and young adult population projections, by age, 2000-2010

	2000		2005		2010		Change 2000-2005	Change 2005-2010
Age	000	%	000	%	000	%	%	%
0-9	38,646	14.0	38,334	13.3	39,537	13.2	-0.8	3.1
10-14	19,908	7.2	20,634	7.2	19,908	6.6	3.6	-3.5
15-19	19,897	7.2	20,990	7.3	21,668	7.2	5.5	3.2
20-24	18,518	6.7	20,159	7.0	21,151	7.1	8.9	4.9
25+	178,339	64.8	187,602	65.2	197,599	65.9	5.2	5.3
Total	**275,306**	**100.0**	**287,716**	**100.0**	**299,862**	**100.0**	**4.5**	**4.2**

Totals may not add due to rounding

Source: U.S. Census Bureau, Current Population Reports and Projections of the Resident Population by Age, Sex, Race, and Hispanic Origin, 1999 to 2000. Calculations by Mintel.

Although later in the decade, 2005 through 2010, the numbers of 10-14 year olds will fall, there will be a corresponding increase in the older teenagers and young adults, both key buying groups for hair styling products. As the numbers of teens continue to grow, manufacturers must recognize the importance of this market since brand loyalty created during the teen and young adult years can potentially mean life-long customers for their products.

Teens and young adults are not only the trendsetters when it comes to hair styling and fashions, but they also increasingly have the cash to support their interests. Figure 3 details teen spending levels from 1996 through 2001.

Figure 3 *Total U.S. teen spending, at current and constant prices, 1996-2001*

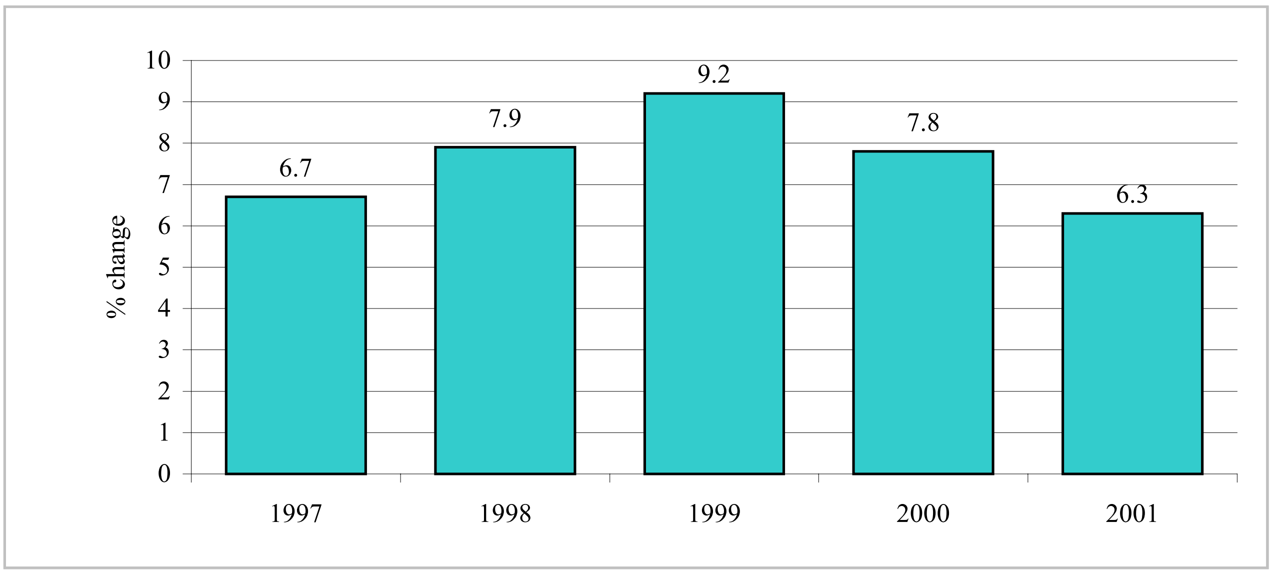
Year	Sales at current prices			Sales at constant 2001 prices*		
	$bn	Index	% change	$bn	Index	% change
1996	74.3	100	-	83.9	100	-
1997	79.3	107	6.7	87.5	104	4.3
1998	85.6	115	7.9	93.0	111	6.3
1999	93.5	126	9.2	99.4	119	6.9
2000	100.8	136	7.8	103.7	124	4.3
2001	107.1	144	6.3	107.1	128	3.3

* adjusted for inflation using the All Items CPI

Source: U.S. Department of Labor/CME/*The Economist*/Frontline/MTV/Quicken.com/tzine.com/Mintel

Graph 1 further details the trend in teen spending.

Graph 1 *Percentage change in U.S. teen spending, at current prices, 1997-2001*



Source: U.S. Department of Labor/CME/*The Economist*/Frontline/MTV/Quicken.com/tzine.com/Mintel

U.S. teens are spending an increasing amount of money each year with the dollar value totaling $107.1 billion in 2001. This equates to around $4,500 a year or about $86.60 per week, given the U.S. teen population aged 12-17 in 2001 totaled 23.8 million.

As reported by Adcoms.com in January 2001, teen spending has increased every year since 1953 and this growth trend is projected to continue through 2005. A conservative estimate projects no less than a 4% increase in spending each year. During the economic boom experienced between 1997 and early 2001, the annual increases were between 6% and 9%. Note that in real terms teen spending will be impacted by the falling numbers of teens through 2005 and 2010.

According to Mintel's *The Teen Consumer, consumer intelligence—U.S. Report, May 2002*, teens spent nearly $10 billion on personal care products in 2001, and unlike among adults, there is a much smaller gap in product use between girls and boys (see Consumer section). These consumers are the ones who would likely be most open to experimenting with the new product formats being introduced, products designed to make a fashion statement. As such, manufacturers offering products in bold colors or packages that offer extreme results like super hold, glitter effects or color will catch the attention of the young, who clearly have money to spend on these products.

Growing minority population

According to Segmented Marketing Services (and as quoted in a June 2001 *Drug Store News* article), people of color spent approximately $5.1 billion for health and beauty products in 2000—$1.6 billion through FDM channels, and $3.5 billion through salons and beauty supply stores. The fact that minorities are accounting for a larger percentage of the U.S. population presents a growing market for manufacturers of styling products. According to the U.S. Census Bureau, in the year 2010, 32.3% of the population will be non-white, up from 28.4% in the year 2000. More specifically, the increase in the female populations of both Hispanics and blacks will be most auspicious in terms of hair styling product sales.

Figures 4 and 5 show the expected increases in the Hispanic and black female population from 2000 to 2010.

Figure 4 Hispanic female population trends, by age, 2000-2010

	2000		2005		2010		Change 2000-2005	Change 2005-2010
	000	%	000	%	000	%	%	%
0-9	3,589	20.9	3,777	19.8	4,214	19.2	5.2	11.6
10-14	1,546	9.0	1,770	9.3	1,916	8.7	14.5	8.2
15-19	1,483	8.7	1,594	8.3	1,938	8.8	7.5	21.6
20-29	3,093	18.0	3,040	15.9	3,382	15.4	-1.7	11.3
30-39	2,808	16.4	2,853	14.9	3,129	14.3	1.6	9.7
40-49	2,014	11.7	2,508	13.1	2,819	12.9	24.5	12.4
50-64	1,604	9.4	2,168	11.3	2,783	12.7	35.2	28.4
10-64 (net)	**12,548**	**73.2**	**13,933**	**72.9**	**15,967**	**72.9**	**11.0**	**14.6**
65+	1,007	5.9	1,394	7.3	1,719	7.8	38.4	23.3
Total	**17,144**	**100.0**	**19,104**	**100.0**	**21,899**	**100.0**	**11.4**	**14.6**

Source: U.S. Census Bureau/Mintel

Figure 5 Black female population trends, by age, 2000-2010

	2000		2005		2010		Change 2000-2005	Change 2005-2010
	000	%	000	%	000	%	%	%
0-9	2,959	16.3	2,818	14.3	2,967	14.2	-4.8	5.3
10-14	1,537	8.4	1,593	8.1	1,459	7.0	3.6	-8.4
15-19	1,447	8.0	1,651	8.4	1,684	8.0	14.1	2.0
20-29	2,685	14.8	2,918	14.8	3,164	15.1	8.7	8.4
30-39	2,877	15.8	2,858	14.5	2,908	13.9	-0.7	1.7
40-49	2,652	14.6	3,015	15.3	2,982	14.2	13.7	-1.1
50-64	2,287	12.6	2,955	15.0	3,626	17.3	29.2	22.7
10-64 (net)	**13,485**	**74.1**	**14,990**	**76.0**	**15,823**	**75.5**	**11.2**	**5.6**
65+	1,749	9.6	1,919	9.7	2,153	10.3	9.7	12.2
Total	**18,193**	**100.0**	**19,727**	**100.0**	**20,944**	**100.0**	**8.4**	**6.2**

Source: U.S. Census Bureau/Mintel

Among both the Hispanic and black populations, the number of women aged 10-64 (the group most likely to use hair styling products) will rise by some 11% each between 2000 and 2005, translating into nearly 3 million possible new consumers. This is a significantly higher increase than for women as a whole (2.5%). Between 2005 and 2010, an additional 2.9 million are expected to join the market (2 million Hispanic women and 833,000 black women) again representing a much higher percentage increase than women as a whole (4.2%).

Industry sources report that black women spend a significantly higher portion of their income on personal care products—approximately three times as much on hair care products and styling aids as non-black women; and according to a 2001 survey by Hispanic Opinion Tracker, Hispanic women are more regular users of personal care products than are non-Hispanic women. Additionally, the total annual spending of Black, Asian and Hispanic consumers combined is estimated at well over $500 billion (Marlene Rossman, author of *Multicultural Marketing*).

In the late 1990s, manufacturers of personal care products began taking a serious look at minority consumers and have reaped the benefits of targeting minority women in advertising campaigns. Those efforts continue today: for example, in 2000, cosmetics giant L'Oréal founded the Chicago-based Institute for Ethnic Hair and Skin Research, which it calls "the world's first research center focused specifically on the study of ethnic skin and hair."

PLANTS, FRUIT PROVIDE KEY INGREDIENTS

Mint*e*l's exclusive consumer research shows that 17% of respondents feel that the inclusion of organic and natural ingredients in hair styling products is the most important factor in their purchasing decisions. This is in keeping with a general growing awareness by consumers of so-called "green" issues, in food, healthcare and lifestyle products. Manufacturers have been quick to capitalize on the trend, both by purchasing natural- and organically-focuses companies (Origins and Aveda are now owned by Estée Lauder) and by introducing products of their own.

For example, in 2002, Aveda launched its Be Curly Curl Enhancing Lotion, which uses wheat protein to lock in curls or waves, and its Hang Straight Straightening Lotion, featuring organic flax seed, organic marsh mallow root, and silica derived from sand. Nexxus' new Phyto Organics line uses "proteins from organic Quinoa plants, organically grown herbs from America's heartland, rare botanicals and revitalizing potions native to exotic corners of the world."

SCIENCE AND CONSUMER CONFIDENCE

Though there is great debate as to how effective advertising and promotion is in prompting consumers to buy products, some 23% of respondents in Mint*e*l's own research count product claims as the most important factor in hair styling product purchasing decisions. This practical bent is one that has previously been evidenced in skin care, where consumers look to studies, statistics and scientific-sounding packaging for information to help their buying decision.

Increasingly, hair styling products are incorporating scientific advances already successfully applied in skincare technology, such as AHAs, lipids, antioxidants, ceramides, and UVA/UVB protection. Vitamin A (Retinyl Palmitate), Vitamin E (Tocopheryl Acetate) and Vitamin C are all being incorporated into hair care ranges for their antioxidant and anti-free radical benefits. An example is Redken, a company that bills itself as "a leader in the science of reconditioning, with many advanced technologies." Similarly, a recent scientific breakthrough from Nexxus is the NexxuSpheres 21st Century technology positioned as "a complete state-of-the-art delivery system that gradually releases and infuses nutrients into the hair, promoting hair's optimal health and beauty." These advanced formulas allow manufacturers to charge more for their products on the basis of better results.

HEAT STYLING-WARY CONSUMERS LOOK FOR ALTERNATIVES

In the face of concerns about hair health and excessive styling appliance use, many consumers are looking to products to get some of the same results with as little appliance use as possible. As Mintel found in consumer research conducted for the *Hair Styling Appliances* report (consumer intelligence—U.S. Report, February 2002), nearly three out of four women surveyed regularly use some type of electrical appliance to style their hair. Figure 6 details which appliances they use.

Figure 6 Hair styling appliances used, November 2001

Base: 449 women aged 18 and over who style their hair

	All %
Use any appliance (net)	**72**
Hair dryer	51
Curling iron	32
Hot air brush or brush iron	7
Hot rollers	7
Straightening or crimping iron	6
Diffuser	3
None of the above	28

Source: ICR/Mintel

Hair dryers and curling irons are the strong favorites for women who style their hair—over half use a hair dryer, while a third regularly use a curling iron.

Whereas these are traditionally the tools women turn to to style their hair, they now have a wide range of non-electric hair care and styling products from which to choose. The choice of hair styling products on the market has increased as customers turn to products for a "fuss free" non-electric hair styling option, or an option that uses only one hair styling appliance. While sales of traditional hair sprays are down, gels, mousses and newer products, such as refresher products that boost curls or tame flyaway straight hair between shampoos, have steadily gained in popularity.

In addition, many consumers view frequently applied heat, particularly from hair dryers, curling irons, and other styling appliances, to be damaging to hair, a perception that has proved a boon for styling product manufacturers. Manufacturers have addressed the market with products that aim to simultaneously improve hair's condition and protect it against heat-styling damage. In 1998, Unilever launched its ThermaSilk products line (including gel, mousse, and spray) which employ heat to trigger the beneficial effects of its ingredients. In 1998, its first year of distribution in FDM channels, ThermaSilk recorded sales of over $9 million.

MARKET SIZE & TRENDS

The total market for hair styling products reached $950 million in 2002, having grown 21%, in current price terms, since 1997. The rate of increase in the market peaked in 2000, which saw a 6% increase in sales, and coincided with the end of the economic boom. Since then, and in an economy that has become weaker, sales have continued to increase, albeit more slowly. In fact in constant price terms sales fell slightly in 2002.

Figure 7 shows the total U.S. retail sales of hair styling products, at current and constant prices for 1997-2002.

Figure 7 FDM sales of hair styling products, at current and constant prices, 1997-2002

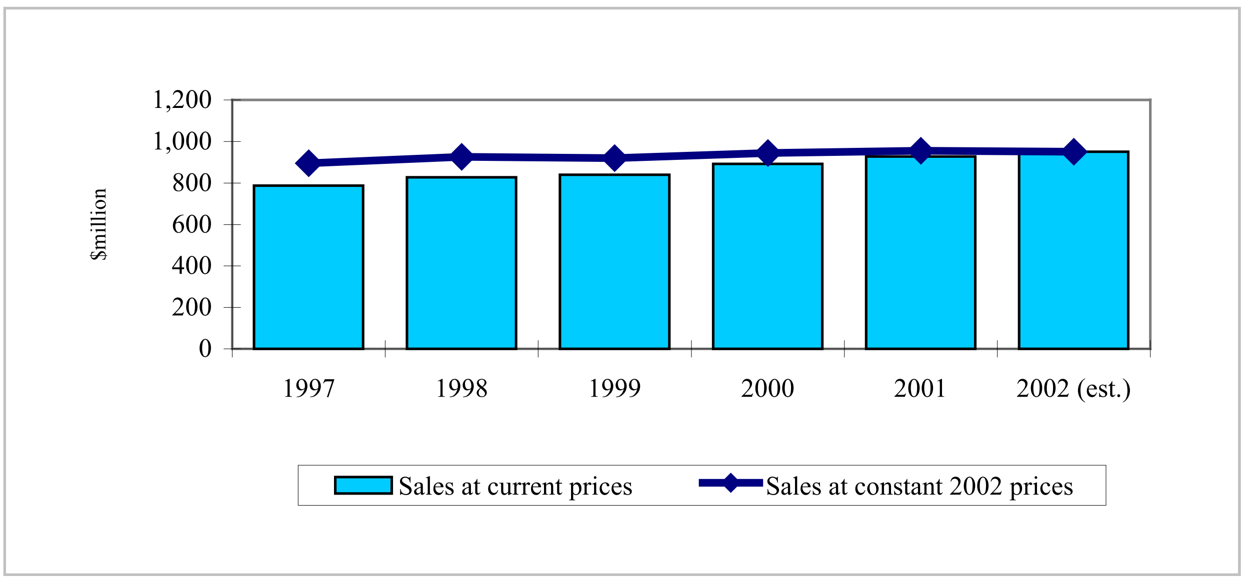
Year	Sales at current prices			Sales at constant 2002 prices*		
	$million	Index	% change	$million	Index	% change
1997	787.0	100	-	894.4	100	-
1998	827.2	105	5.1	925.7	103	3.5
1999	839.9	107	1.5	919.6	103	-0.7
2000	891.4	113	6.1	944.2	106	2.7
2001	927.4	118	4.0	955.2	107	1.2
2002 (est.)	949.9	121	2.4	949.9	106	-0.6

Note: Data exclude Wal-Mart
* adjusted for inflation using the All Items CPI

Source: IRI/ACNielsen/Mintel

Graph 2 further illustrates trends in sales of hair styling products from 1997 to 2002.

Graph 2 Trends in FDM sales of hair styling products, at current and constant prices, 1997-2002



Note: Data exclude Wal-Mart

Source: IRI/ACNielsen/Mintel

While the market is expected to register a 21% increase at current prices over the review period, it is not expected to perform as well at constant 2002 prices, at a modest 6%. The wide variety of products and accompanying price competition may explain this gap, as inexpensive traditional FDM brands compete with salon name brands like American Crew, TIGI, Matrix and Redken, creating a presence for themselves in these outlets.

The overall market hides opposing trends within the component sectors of hair spray and gels/mousses, which is explored in further detail in the Market Segmentation section. However, sales of hair spray have declined, while sales of gels, pomades, mousses and other styling sprays (which can be more expensive than hair spray) are driving the market. New product introduction has fueled growth of the market in general, but especially among gels, mousses and pomades.

Younger consumers are moving away from hair spray, which is considered old fashioned and does not allow hair movement or versatility like other products do. There are also more options in gels, pomades and mousses, with different products specifically designed for certain hair types or conditions—curly, straight, colored, or fighting dandruff.

MARKET SEGMENTATION

OVERVIEW

In order to better understand the overall hair styling products market, it is useful to examine the segments within the market. The market can be broken down as follows:

- Hair gels and mousse
- Hair spray and spritz.

While the market overall is fairly steady, the two main segments have experienced opposing trends. Figure 8 shows the U.S. sales of hair styling products, segmented by type, for 2000 and 2002.

Figure 8 FDM sales of hair styling products, by type, 2000 & 2002

	2000		2002 (est.)		Change
	Sales $million	Share %	Sales $million	Share %	2000-2002 %
Hair gels and mousses	469.0	52.6	546.9	57.6	16.6
Hair spray and spritz	422.4	47.4	403.0	42.4	-4.6
Total	**891.4**	**100.0**	**949.9**	**100.0**	**6.6**

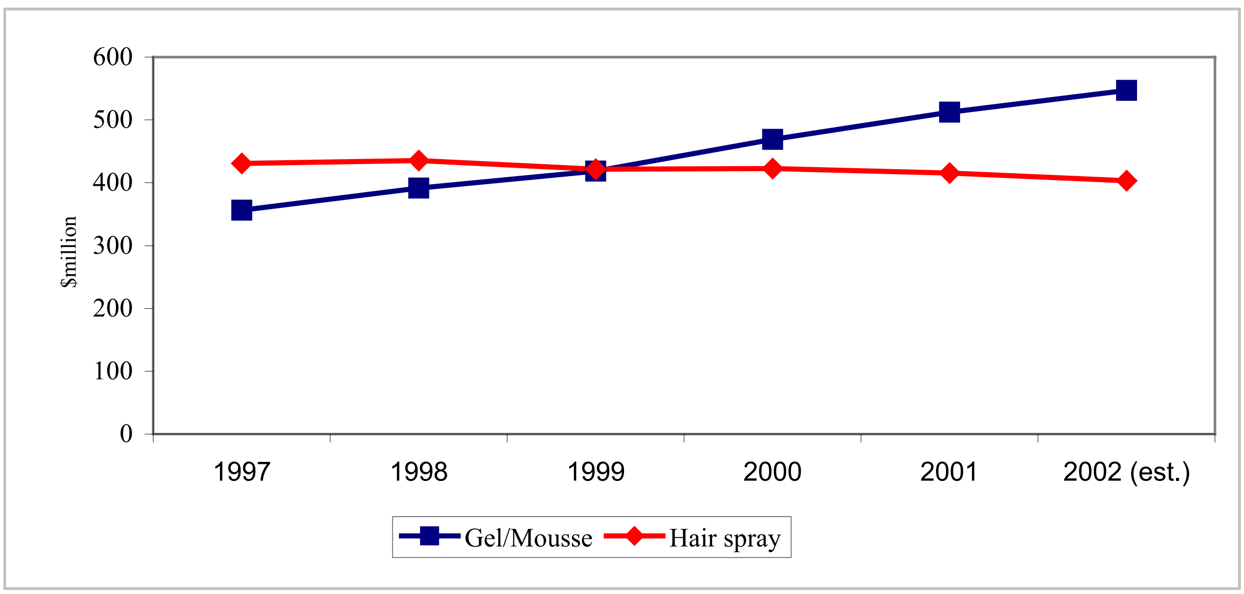
Note: Data exclude Wal-Mart
Data may not equal totals due to rounding

Source: IRI/Mintel

Market growth has been dampened by the poor performance of hair sprays, which have failed to keep pace with other styling products by offering other benefits. While hair sprays have been traditionally designed to hold styles, hair gels and mousses have been introduced that sculpt, mold, moisturize and smooth hair—functions that hair sprays typically cannot perform. Hair gels and mousses have undergone a period of buoyant growth, with numerous new formats introduced by both the major and smaller brands, while hair sprays are increasingly regarded by younger consumers as old-fashioned and out of touch with their styling needs.

Graph 3 depicts trends in sales of both segments over the review period.

Graph 3 ***Trends in FDM sales of hair styling products, by segment, 1997-2002***



Note: Data exclude Wal-Mart

Source: IRI/Mintel

Each of these segments is examined in turn in the following sections.

HAIR GELS AND MOUSSE

Figure 9 details FDM sales of hair gels and mousse over the review period.

Figure 9 FDM sales of hair gels and mousse, 1997-2002

Year	Sales at current prices			Sales at constant 2002 prices*		
	$million	Index	% change	$million	Index	% change
1997	356.1	100	-	404.7	100	-
1998	391.7	110	10.0	438.4	108	8.3
1999	418.3	117	6.8	457.9	113	4.5
2000	469.0	132	12.1	496.8	123	8.5
2001	512.1	144	9.2	527.4	130	6.2
2002	546.9	154	6.8	546.9	135	3.7

Note: Data exclude Wal-Mart
* adjusted for inflation using the All Items CPI

Source: IRI/Mintel

Clearly the year 2000 was a period of heavy activity for this segment, as it welcomed a number of completely new product introductions, like P&G's Physique line, which contributed sales of over $17 million to the segment in its first year. While the market saw notable growth from 2001-2002, these increases are attributed to the new product lines of 2000 attaining greater distribution, and line extensions being introduced to the market.

FDM sales of hair gels and mousse have grown steadily since 1997, largely reflecting the success of new products introduced into this category. Many styling ranges have expanded to include a wide range of different products in varying strengths, enabling consumers to achieve their own personal style, even creating new styles throughout the day either with or without water. For example, L'Oréal's Studio Line range includes a texturizing styling paste that allows hair to be molded in any way, enabling new styles to be created throughout the day without the need for further application. Sebastian found success with a flexible sculpting bonder known as Molding Mud, and Aveda's "Control Paste" claims to make a "natural mess of your hair."

Even the emerging product terminology reflects this experimentation—where once this category comprised only gels and mousses, now it includes such diverse products as "hair putty" and the forementioned "molding mud," with new descriptors appearing on an ongoing basis.

HAIR SPRAY AND SPRITZ

Hair spray is a mature market currently in a period of decline, as shown in Figure 10.

Figure 10 Retail sales of hair spray and spritz, 1997-2002

Year	Sales at current prices			Sales at constant 2002 prices*		
	$million	Index	% change	$million	Index	% change
1997	430.9	100	-	489.7	100	-
1998	435.5	101	1.1	487.3	100	-0.5
1999	421.6	98	-3.2	461.6	94	-5.3
2000	422.4	98	0.2	447.5	91	-3.1
2001	415.3	96	-1.7	427.8	87	-4.4
2002	403.0	94	-3.0	403.0	82	-5.8

* adjusted for inflation using the All Items CPI

Source: IRI/Mintel

This segment has, in real terms, declined every year since 1997, and lost. In addition to being seen by younger consumers as a product that their parents or grandparents used, in a period when hair styling products (and personal care products as a whole) are taking on a natural approach, the segment is also plagued with perceptions of being drying or damaging to the hair due to the high alcohol content of some products. The year 2000, a buoyant year for the gel and mousse segment, was barely saved from a decline by the introduction of hair spray products in P&G's Physique line, which contributed over $12 million to the segment in that year.

Other notable new product introductions include TRESemmé, which introduced two new products in 1999 that combined to contribute over $10 million in 2001; Suave's Herbal Care hair spray, also introduced in 1999, doubled its sales by 2001 and registered FDM sales of over $6 million.

Fighting its image of hair spray leaving hair stiff or sticky, new products that have found success in the segment (and tempered the severity of the decline of the segment) have offered users more than just styling hold. In addition to strong hold and movement, products promise shine, a soft feel and a natural look. Redmond Products' Aussie Real Volume hair spray (2001) offers users fuller hair; L'Oréal's Studio Line Fast Forward (2001) dries quickly, while allowing hair to move; John Frieda's Sheer Blonde spray (1999), which promises to dry clear and not darken blonde hair. In 2001, these products combined to contribute over $5 million to the hair spray segment.

SUPPLY STRUCTURE

The Supply Structure section covers production of hair styling products. Manufacturer and brand profiles are included.

MANUFACTURER SALES

In the hair styling products market, there is no one manufacturer that dominates. Though Helene Curtis holds the top share, it represents just 16.2% of the market, with Procter & Gamble coming in close behind at 13.4%. Smaller companies are building on specialty niches, such as John Frieda's Sheer Blonde (for fair hair) and Relax (for black hair) product lines.

The composition of suppliers to the market will likely not change very much, in terms of who is competing, but what is expected to change is the previously somewhat separate black hair care market (often referred to as the "ethnic hair care market"). As large multinational companies like L'Oréal and Alberto-Culver continue to buy up smaller, traditionally black-owned companies to gain access to black consumers and their higher-than-average personal care product dollar, the brand names on the market may remain the same, but ownership of these brands will increasingly be held by just a few companies.

Additionally, the acquisition of several key Clairol brands by Procter & Gamble at the end of 2001, like Herbal Essences, as well as a full portfolio of Clairol hair color brands, will help to boost the company's share of this crowded market.

Figure 11 shows the manufacturer sales of hair styling products, 1999 and 2001.

Figure 11 FDM sales of hair styling products, by manufacturer, 1999 & 2001

Manufacturer	1999		2001		Change
	Sales $million	Share %	Sales $million	Share %	1999-2001 %
Helene Curtis	142.0	16.9	149.8	16.2	5.5
Procter & Gamble	88.8	10.6	124.1	13.4	39.8
Chesebrough-Pond's	68.9	8.2	61.0	6.6	-11.5
Clairol	65.9	7.8	56.4	6.1	-14.4
Schwarzkopf & Dep Inc	48.7	5.8	55.3	6.0	13.6
L'Oréal	43.1	5.1	50.7	5.5	17.6
John Frieda	39.0	4.6	49.1	5.3	25.9
Alberto-Culver	29.5	3.5	38.2	4.1	29.5
White Rain	34.8	4.1	29.0	3.1	-16.7
Sebastian	15.2	1.8	27.7	3.0	82.2
Redmond Prods	28.7	3.4	25.9	2.8	-9.8
Private label	4.1	0.5	3.6	0.4	-12.2
All other	231.2	27.5	256.6	27.7	11.0
Total	**839.9**	**100.0**	**927.4**	**100.0**	**10.4**

Note: Data exclude Wal-Mart
Data may not equal totals due to rounding

Source: Mintel/IRI/ACNielsen

Helene Curtis remains the market leader for hair styling products with revenues and market shares rising from 2000 to 2002. Procter & Gamble enjoyed the largest growth of the leading companies (39.8%), largely due to its highly successful Physique line, as previously mentioned. Even more promising for the company was the acquisition of Clairol's popular Herbal Essences brand at the end of 2001, which tempered the declines that Clairol would have seen over the period due to falling sales of its Daily Defense, Final Net and Condition by Clairol brands.

Overall, fierce competition in the hair styling products market means that major companies such as Chesebrough-Pond's, Clairol, Schwarzkopf & Dep, L'Oréal, and John Frieda each hold less than 10% share. Moreover, many of these leading brands are slowly losing market share due to the continual development of new products on the market. But more than consumers moving from product to product that provides the same benefit, new products that meet the needs of specific hair types are appearing more often and consumers are highly likely to be discovering that one product suits their needs better than another.

BRAND SALES BY SEGMENT

Gels and mousses

The gels and mousses category is the most robust of the market segments, due to continual new product innovation.

Figure 12 details sales of gels and mousses by brand for 1999 and 2001.

Figure 12 FDM brand sales of gels and mousses, 1999 & 2001

Manufacturer	Brand	1999		2001		Change
		Sales $million	Share %	Sales $million	Share %	1999-2001 %
Helene Curtis	**Total**	**58.5**	**14.0**	**67.3**	**13.1**	**15.0**
Procter & Gamble	**Total**	**27.8**	**6.6**	**64.3**	**12.6**	**131.3**
	Pantene	20.5	4.9	38.1	7.4	85.9
	Other	7.3	1.7	26.2	5.2	258.9
Schwarzkopf & Dep	**Total**	**48.7**	**11.6**	**55.3**	**10.8**	**13.6**
	L.A. Looks	28.9	6.9	33.9	6.6	17.3
	Other	19.8	4.7	21.3	4.1	7.6
L'Oréal	**Total**	**43.1**	**10.3**	**50.7**	**9.9**	**17.6**
	Studio Line	37.4	8.9	46.6	9.1	24.6
	Other	5.7	1.4	4.1	0.8	-28.1
John Frieda	**Total**	**39.0**	**9.3**	**49.1**	**9.6**	**25.9**
	Frizz-Ease	30.4	7.3	35.9	7.0	18.1
	Other	8.6	2.0	13.2	2.6	53.5
Clairol	**Total**	**30.6**	**7.3**	**29.0**	**5.7**	**-5.2**
	Herbal Essences	18.3	4.4	21.7	4.2	18.6
	Other	12.3	2.9	7.3	1.5	-40.7
Private label		3.5	0.8	3.1	0.6	-11.4
All other		167.1	39.9	193.3	37.7	15.7
Total		**418.3**	**100.0**	**512.1**	**100.0**	**22.4**

Note: Data exclude Wal-Mart

Source: IRI/Mintel

Though Helene Curtis holds the largest share of the segment, at 13%, none of its six brands holds more than 4% by itself. P&G's 131% growth over the period came from the year 2000 introduction of its Physique line of premium products. Priced at the higher end of the spectrum, with prices similar to that of salon names like Rusk, Sebastian and TIGI, the Physique line contributed over $15 million to P&G's sales in 2001 alone.

John Frieda's 2001 introduction of the Beach Blonde line accounts for the significant growth in the "Other John Frieda" sales, registering FDM sales of over $2 million in its first year, according to IRI.

The fact that over a third of sales of gels and mousses is accounted for by manufacturers with less than 5% share shows the high level of fragmentation in this market.

Private label accounts for only a fraction of sales, indicating that consumers may be willing to trust the store brand for other things like food items and staples like diapers, but obviously not yet for styling products. The exception to this may be in the case of salons and/or beauty supply stores (not covered in this report), where consumers may be more easily convinced that the store brand will perform as well as a name brand.

Hair spray and spritz

Figure 13 details sales of hair spray and spritz by brand for 1999 and 2001.

Figure 13 FDM brand sales of hair spray and spritz, 1999 & 2001

Company	Brand	1999 Sales $million	1999 Share %	2001 Sales $million	2001 Share %	Change 1999-2001 %
Helene Curtis (Unilever)	**Total**	**83.5**	**19.8**	**82.5**	**19.9**	**-1.2**
	Suave	23.0	5.5	26.8	6.5	14.2
	Salon Selectives	22.6	5.4	19.5	4.7	-15.9
	Other	37.9	8.9	36.2	8.7	-4.5
Chesebrough-Pond's (Unilever)	**Total**	**68.9**	**16.3**	**61.0**	**14.7**	**-13.0**
	Rave	41.7	9.9	41.4	10.0	-0.7
	Aqua Net	23.7	5.6	18.1	4.4	-30.9
	Other	3.5	0.8	1.5	0.4	-57.1
Procter & Gamble	**Total**	**61.0**	**14.5**	**59.8**	**14.4**	**-2.0**
	Pantene ProV	48.9	11.6	43.5	10.5	-12.4
	Other	12.1	2.9	16.3	3.9	34.7
Alberto-Culver	**Total**	**29.5**	**7.0**	**38.2**	**9.2**	**22.8**
	TRESemmè	3.8	0.9	14.6	3.5	74.0
	Alberto Consort	10.3	2.4	13.5	3.3	23.7
	Other	15.5	3.6	10.1	2.5	-34.8
White Rain	**Total**	**34.8**	**8.3**	**29.0**	**7.0**	**-20.0**
	White Rain	19.3	4.6	15.9	3.8	-21.4
	Other	15.5	3.7	13.1	3.2	-15.5
Sebastian	**Total**	**15.2**	**3.6**	**27.7**	**6.7**	**45.1**
Clairol	**Total**	**35.3**	**8.4**	**27.4**	**6.6**	**-28.8**
	Herbal Essences	19.1	4.5	19.0	4.6	-0.5
	Other	16.2	3.9	8.4	2.0	-48.1
Redmond Products	**Total**	**28.7**	**6.8**	**25.9**	**6.2**	**-10.8**
Private label		0.6	0.1	0.5	0.1	-20.0
All other		64.1	15.2	63.3	15.2	-1.3
Total		**421.6**	**100.0**	**415.3**	**100.0**	**-1.5**

Data may not equal totals due to rounding
Note: Data exclude Wal-Mart

Source: IRI/Mintel

Industry leader Helene Curtis again tops the list with $82.5 million in sales for 2001, up 19.9% on 1999. Clairol had the largest sales decline (28.8%) in that year, a decline slowed only by the success of its Herbal Essences line, which was sold to Procter & Gamble at the end of 2001.

Sebastian had the largest share increase (45.1%), due to strong performance by products that exemplify the turn that hair spray products have taken to keep from losing favor with consumers altogether. Among these products are Shaper hair spray, said to shape hair during blow drying, giving hair movement (2001 sales of $5 million); Shaper Plus spray, which resists humidity with a non-sticky texture (2001 sales of $5 million); and Shaper Zero G spray, a quick-drying control spray designed not to weigh hair down (2001 sales of $1.6 million).

COMPANY PROFILES

Following are brief profiles of the major hair styling products manufacturers.

Unilever—Helene Curtis and Chesebrough-Ponds

Dually headquartered in London (UK) and Rotterdam (the Netherlands), Unilever is one of the world's top packaged consumer goods companies. The company was formed in 1930 by the merger of the Dutch margarine company Margarine Unie, and soapmaker Lever Brothers. Since then the company has grown to reach sales totaling $49.2 billion in 2001.

This represents a 10% increase over 2000 sales figures for the company, which coincides with the "Path to Growth Strategy" Unilever announced in February of 2000. Under this strategy the company plans to accelerate topline growth through fewer, stronger brands through 2004.

Unilever is focusing on making its biggest brands even bigger, in part by whittling its total number of brands down to about 400 from 1,600. It is also splitting its operations into two global units, separating food and non-food products. The purchase of Bestfoods in 2000 made it one of the world's top three food firms. In toiletries, Unilever produces a wide range of personal products, including deodorants (Degree), fragrances (Calvin Klein, Lagerfeld), soap (Lever 2000, Lux), and body washes (Dove). Other brand names for the company include Vaseline, Lipton, Bertolli, Knorr, Magnum, Omo and Q-Tips.

The company is split into two business groups: Unilever Bestfoods and The Home and Personal Care division of Unilever. The Home and Personal Care division combined the company's subsidiaries of Helene Curtis Industries, Chesebrough-Pond's and Lever Brothers Company. The acquisition of Helene Curtis was completed in 1996.

Hair care brands under Helene Curtis include the following:

- Finesse and Finesse Touchable gels/mousses that moisturize, add volume and give control; and hair sprays specifically marketed as never leaving hair sticky or stiff
- Suave and Suave Herbal Care gels/mousses and hair sprays in a variety of holds, scents and forms. Also includes Rave, which was previously under Chesebrough-Pond's

- Thermasilk hair sprays in flexible and firm formulations, volumizing mousse for different hair types, sculpting and shine and shaping gels, a frizz fighter and other shine and volumizing products
- Salon Selectives hair sprays, gels and mousses for a variety of hair types and functions, including air-it-out odor neutralizer for hair, designed to remove odors and leave hair smelling fresh; get in shape and rise up shaping mousses; control[D] substance, a styling putty for short and textured styles.

The company's website, helenecurtis.com, provides detailed information on all the Thermasilk, Salon Selectives and Finesse products. Suave.com gives information on Suave products, and RaveHair.com is the official website for the Rave line.

Chesebrough-Pond's owns the Aqua Net hair spray, Groom & Clean men's hair control, and Vaseline brand men's hairdress—three long-established name brands with loyal followings.

Procter & Gamble

Created in 1837, Cincinnati, Ohio-based Procter & Gamble is the top consumer packaged goods manufacturer in the U.S., with 2002 sales of $40.2 billion (fiscal year-end June). The company makes some 300 brands, many of them the market leaders in their categories (Pampers diapers, Cover Girl and Ivory in beauty care, Folgers and Eagle in food and beverages, Crest and Pepto-Bismol in healthcare, Tide and Cheer in laundry and cleaning, and Bounty and Charmin in paper products). Procter and Gamble also purchased Clairol (hair products) from Bristol-Meyer Squibb in 2001 and owns Iams pet food, maker of Iams and Eukanuba (purchased 1999).

P&G underwent restructuring and repositioning during the late 1990s and into the 2000s. With earnings flat (the company recorded a one-year sales decline of 1.8% between 2000 and 2001), P&G has been selling off underperforming brands including Comet cleanser (October 2001, to Prestige Brands International) and Jif peanut butter and Crisco shortening/salad oil (to J.M. Smucker Company, also October 2001), to focus energies on building its market leaders.

The company's hair styling brands include the following:

- Pantene ProV, a full line of styling aids, shampoo and conditioners
- Physique, a complete line of styling aids, as well as shampoos and conditioners, that have proven to be one of the company's most successful product lines
- Vidal Sassoon hair sprays, gels, mousses and pomades, among other products like shampoos and conditioners
- Herbal Essences styling products, shampoos, conditioners and hair color.

Brand websites—pantene.com, physique.com, vidalsassoon.com and herbal essences.com—feature styling tips, advice on choosing the right products, and directions on how to use the products.

Schwarzkopf & Dep Inc

Incorporated in 1956, the Dep Corporation opened with just one product—Dep hair gel. Introduced to the mass market in 1970, Dep hair gel's status as the company's only product didn't change until 1987 when the company acquired a number of personal care products like Lilt home permanents, Lavoris mouthwash and Fa body washes. The Dep brand includes the original Dep line of styling gels, as well as Dep Sport, gels and hair spray designed to hold longer for users with "active lifestyles." The dep.com website features descriptions of each of the brand's products, as well as quizzes, contests and opportunities to receive free Dep products.

The company's most successful brand, however, is L.A. Looks, which was launched in 1991. The line of gels, mousses and hair sprays outsold the flagship Dep brand in its second year. L.A. Looks now includes the Pro Styling line, positioned to offer salon-quality results at FDM prices. In addition to product descriptions, the brand's website—lalooks.com—suggests products to use based on desired results and offers links to related websites.

The company reported 2001 sales of $92 million.

John Frieda

Founded in 1990, Wilton, Connecticut-based John Frieda Professional Hair Care holds the distinction of owning one of the most popular hair stylings product, showing 2001 sales of over $35 million from its Frizz-Ease product. The company's brands include frizz-ease, sheer blonde, beach blonde, readytowear, and relax, a line introduced in 2001 to specifically address the needs of black hair.

Unlike the majority of hair styling products found in FDM channels, John Frieda owes much of its success to drug store sales, which goes back to the line originally being introduced in drug stores before it reached nationwide distribution. According to the company, drug stores account for 50% of sales, while mass merchandisers and supermarkets account for 30% and 20% respectively.

In August 2002, it was announced that The Andrew Jergens Company, the U.S. subsidiary of Japanese soap-maker Kao Corporation, would buy John Frieda Professional Hair Care, Inc. for $450 million. The company plans to leverage the research and development capabilities of Jergens, as well as expand distribution using Jergens' well-established position in both food stores and mass merchandisers to capitalize on untapped potential in these stores.

The company's website, frizzease.com, in addition to listing the products available under each of the brand names, also directs consumers to where they may buy the products, listing retailers by area as well as where products can be bought online.

After starting with an advertising budget of $30,000 in 1991, the company's 2001 budget was reported to be over $10 million, with $3.8 million going to television ads and $7.1 million for print, (according to *Women's Wear Daily*).

L'Oréal

Established in 1909, L'Oréal is the world's largest cosmetics company. The company is broken up into four divisions—consumer (hair care, skin care and makeup), professional (salon hair care), luxury (beauty products and fragrances), and active cosmetics (dermo-cosmetic products). The company's U.S. hair care brand names include L'Oréal Studio Line, Studio FX, Bodyvive, Colorvive, Curl Vive, in addition to a number of hair color, makeup and designer fragrance lines.

Recognizing opportunities present in the black hair care market, L'Oréal acquired Soft Sheen in 1998, and with it came the mass market Optimum line and salon-exclusive Mizani, which both include hair styling products as well as shampoos, conditioners and relaxers. Further in that direction, the company purchased Carson in 2000, and added its ethnic hair care products to its stable. The company also acquired Kiehl's Since 1851, and its prestigious line of hair, skin and body care products, and Matrix Essentials, a salon line of hair care products, in 2000.

In 2001, L'Oréal opened the L'Oréal Institute for Ethnic Hair & Skin Research in Chicago, a center dedicated to generating information for the general public, as well as scientists and doctors, on various ethnic personal care issues.

Further cementing its position in the broader hair care market, L'Oréal USA took on a number of salon-only hair care products with the acquisition of ARTec Systems Group in 2002.

The company reported sales of $12.2 billion in 2001, up 2% from 2000, and L'Oréal's North America business accounted for some 32% of total sales. Consumer product sales (hair care, skin care and makeup) accounted for more than half of all sales.

Alberto-Culver

Based in Melrose Park, Illinois, acquisition, as well as invention, has been the key to Alberto-Culver's success. The company's first product was Alberto VO5 Conditioning Hairdressing, created in the early 1950s and still on the market today. TRESemmè, sold on the premise of being salon-quality products at FDM store prices, was acquired in 1959. This was followed by the introduction of Alberto VO5 hair spray in 1961, and Alberto Consort hair spray for men in 1965.

Though the company already owned two black hair care lines—TCB (mass market) and Motions (salon-quality)—Alberto-Culver continued the trend of mainstream companies acquiring small black hair care companies with the acquisition of Pro-Line in 2000. The acquisition made Alberto-Culver the number two ethnic hair care products company in the world, according to the company's annual report.

Alberto-Culver reported U.S. sales of $1.94 billion in 2001, up from $1.70 billion in 2000; total company 2002 sales were $2.65 billion, up from $2.49 billion in 2001 (fiscal year-end is September 30). While its Sally Beauty Supply chain contributes over half of company sales, the company credits 2001-2002 sales growth to the introduction of the TRESemmè Hydrology line, (which includes gel, pomade, mousse, hair spray, shampoo and conditioner); Motions hair care products, Alberto VO5 herbal shampoos and conditioners, and new St. Ives facial and body care products.

ADVERTISING & PROMOTION

INTRODUCTION

By the end of 2001, total ad spending in the U.S. had declined 7% on the previous year, with the greatest declines measured in spending for national television (a decline of 20%) and broadcast syndication (a decline of 18%) spots. According to a survey conducted by *Advertising Age* (published February 11, 2002), the majority of advertisers and agency executives in the U.S. reported tightening ad budgets at the start of 2002. Some 55% of agencies and marketers felt that budgets would continue to decrease throughout the year. But a new study conducted by Nielsen Monitor-Plus suggests that the anticipated declines have not actually occurred. According to the study, first quarter 2002 ad spending in eight major media categories rose to $17.3 billion, an increase of 1.8% over the same period in 2001.

COMPANIES AND BRANDS

There follow brief profiles of the activities of some of the major players in the hair styling products market.

Procter & Gamble

As the second largest ad spender in the U.S. behind General Motors, Procter & Gamble actively promotes most of its brands through print, television and outdoor advertising.

Following the 2001 acquisition of many of Clairol's popular brands, including the Herbal Essences line and Nice & Easy hair color, P&G announced plans for a full-scale advertising and promotion program for its newly acquired hair color lines. Though the company will not disclose its expenditures, analysts quoted in *Women's Wear Daily* estimate that television, print and billboard ads will cost $12-18 million in their first eight weeks. Ericsson Fina, a division of Grey Worldwide, is handling the account.

Specifically, in support of its Herbal Essences Line, P&G rolled out a TV and print advertising campaign in June, estimated to be near $20 million.

P&G's venerable Pantene line of shampoos, conditioners and styling products received $20 million in ad support in 2002 and will run in TV, Internet and print media. Select promotions will feature soap opera star/talk show host Kelly Ripa and America Ballet Theater dancer Julie Kent discussing why they use Pantene products.

The company is also pushing Pantene Pro-V by sponsoring a female amateur vocalist contest in partnership with Coca-Cola, The American Music Awards, Dick Clark Communications, and The CMJ Network. Among other prizes, the winner of the contest is featured in a Pantene advertising campaign. According to David Caruso of Grey Alliance, the purpose of the promotion is to "increase awareness for the Pantene brand, create positive imagery and build brand affinity."

Schwarzkopf & Dep

German manufacturer Henkel KGaA, after purchasing Schwarzkopf, a salon-only line of hair color, in 1995, acquired Dep in 1999 and immediately boosted the company's presence in the market with television advertising, which Dep had not previously done.

In 2001, Dep sought to reposition its L.A. Looks line to attract a broader age segment. Originally the products were targeted to young women in their teens and early twenties, with ads aired on MTV and printed in magazines such as *Seventeen* and *Teen People*. The new campaign featured a 30-second TV spot along with two print ads emphasizing "self-expression" and broader product appeal.

In early 2002, Dep refurbished its existing line of gel products, introduced new products and updated its presentation. The new line features products with Energy Complex (conditioners designed to make hair healthier and stronger), and added features like dandruff control. Two of its best selling brands from the relaunch sell under the name Dep Sport and were supported in an April 2002 print campaign. The promotion spanned health, beauty and fitness magazines.

Alberto-Culver

According to the company's annual report, Albert Culver's 2001 advertising budget was $305.1 million, up from $286.4 million in 2000. The company has, over the past few years, steadily increased its ad budget as part of a stated strategy to support its global brands.

For its 2000 introduction of TRESemmé Hydrology, a line developed to moisturize and hydrate dry hair, the company provided $20 million in advertising that covers print, television and Internet media.

In 2002, Alberto-Culver initiated a campaign for its St. Ives brand, reinforcing the company's Swiss heritage. The marketing effort includes all products within the St. Ives line—styling products, shampoos and conditioners, skin and body care—and, according to Culver's vice president of skin care, North America, "There's a tremendous equity in the brand's Swiss image and we have never taken advantage of that." The total cost of the ads is expected to be more than $25 million.

Unilever—Helene Curtis and Chesebrough-Ponds

With sales of nearly $50 billion, Unilever operates with a formidable advertising budget. In the U.S. in 2001, Unilever spent nearly $200 million in advertising and another $200 million in consumer promotion. In the hair care category, the company has responded to Procter & Gamble's acquisition of Clairol by repositioning and launching new products backed by significant ad push. In 2001, Unilever called for an increase in marketing revenue, up to $125 million from $78 million a year earlier.

Its most significant move will be the introduction of Dove hair care products in early 2003. The launch will be supported by an ad campaign of more than $50 million.

Unilever is also in the process of burnishing the image of its value hair care brand Suave. In addition to extending its line—introducing tween hair care product Suave Hair Vibe, for example—Suave has also pulled Unilever's other value priced line Rave (a Chesebrough-Pond's brand) under its banner. To that end, Rave products have been revamped and re-targeted towards a younger, more fashion conscious consumer. Advertising and promotional support will include direct mail offers, point-of-purchase displays, bonus packs and print advertisements. In May 2002 Unilever, to promote Hair Vibe, initiated a $10 million advertising program tied to kids' cable network Nickelodeon with two 30 second ad spots.

L'Oréal

Just like competitors P&G and Unilever, L'Oréal is rolling out two new brands and revamping several others. For example, the company's Vive line will be trading up in packaging, price, and formulation.

More significantly, however, in 2003, Maybelline Garnier will introduce Fructis shampoo and conditioners which will receive $100 million in ad support. For the company's hair color business, L'Oréal will follow a similar line by pushing new product launches and makeovers. It has planned a $35 million media spend on Coleur Experte, a high-end hair color treatment system boasting a professional-level formulation. This launch will occur alongside a restaging of other coloring products including Excellence and Castings (renamed Color Spa Mostif Actif).

RETAIL DISTRIBUTION

OVERVIEW

Figure 14 details the channel share of FDM sales of hair styling products for 2000 and 2002.

Figure 14 FDM sales of hair styling products, by channel, 2000 & 2002

	2000		2002 (est.)		Change
	Sales $million	Share %	Sales $million	Share %	2000-2002 %
Supermarkets	378.9	42.5	391.4	41.2	3.3
Drug stores	336.6	37.8	367.6	38.7	9.2
Mass merchandisers	176.0	19.7	190.9	20.1	8.5
Total	**891.4**	**100.0**	**949.9**	**100.0**	**6.6**

Note: Data exclude Wal-Mart

Source: IRI/Mintel

Supermarkets account for the largest share of styling product sales, though that lead is dwindling in the face of competition from drug stores and mass merchandisers. Mass merchandisers are still showing strong increases (even without Wal-Mart sales figures), while drug stores are benefiting from success of brands like John Frieda, which looks to drug stores for half of its sales.

SUPERMARKETS

Figure 15 shows sales of hair styling products in food stores between 1997 and 2002.

Figure 15 Food store sales of hair styling products, 1997-2002

Year	Sales at current prices			Sales at constant 2002 prices*		
	$million	Index	% change	$million	Index	% change
1997	337.0	100	-	383.0	100	-
1998	350.9	104	4.1	392.7	103	2.5
1999	355.2	105	1.2	388.9	102	-1.0
2000	378.9	112	6.7	401.3	105	3.2
2001	386.3	115	2.0	397.9	104	-0.8
2002 (est.)	391.4	116	1.3	391.4	102	-1.6

* adjusted for inflation using the All Items CPI

Source: IRI/Mintel

Sales of hair styling products through supermarkets have risen steadily at current 2002 prices. However, removing the effects of inflation shows sales in real term decline since 2000. Peaks in growth seen in 1998 and 2000 are almost solely attributed to new product introductions. For example, the nearly 7% increase seen from 1999 to 2000 can be attributed to new hair spray products introduced in that year or the previous year—Sebastian Shaper, TRESemmè Tres, and Clairol Daily Defense—which combined to grow sales by nearly $15 million; in gel/mousse products, P&G's Physique line added $6.4 million in its first year and established brands like P&G's Pantene Pro V line accounted for $12.5 million alone.

Sales of John Frieda's Frizz-Ease, which already had a presence in food stores, soared in 2000, contributing over $8.4 million just in food stores. At the same time salon brands like American Crew and TIGI gained a wider presence in food stores and drew customers who found it convenient to pick up their favorite salon brands at the grocery store.

Figure 16 shows the top food retailers by sales, financial years ending 2000 and 2001.

Figure 16 Top food retailers by sales, 2001 & 2002

Store name (latest fiscal year end)	Sales		Change
	2001	2002	2001-2002
	$bn	$bn	%
Wal-Mart (1/31/02)	108.7	121.9	12.1
Kroger (2/3/02)	48.0	50.1	4.4
Albertson's (2/1/02)	35.8	37.9	5.9
Safeway (12/30/01)	32.0	34.3	7.2
Ahold USA (12/31/01)	20.9	23.2	11.0
Supervalu (4/4/02)	23.2	21.0	-9.5
Publix (12/30/01)	14.6	15.3	4.8
Delhaize (12/31/01)	12.7	14.9	17.3
Winn-Dixie Stores (6/28/02)	12.9	12.3	-4.7
Great Atlantic & Pacific Tea Co. (2/24/02)	10.6	11.0	3.8
Total	**317.3**	**344.7**	**8.6**

Source: Edgar Online/Mintel

DRUG STORES

Figure 17 shows sales of hair styling products in drug stores between 1997 and 2002.

Figure 17 Drug store sales of hair styling products, 1997-2002

Year	Sales at current prices			Sales at constant 2002 prices*		
	$million	Index	% change	$million	Index	% change
1997	300.1	100	-	341.0	100	-
1998	316.0	105	5.3	353.6	104	3.7
1999	319.7	107	1.2	350.0	103	-1.0
2000	336.5	112	5.3	356.4	105	1.8
2001	354.1	118	5.2	364.7	107	2.3
2002 (est.)	367.6	122	3.8	367.6	108	0.8

* adjusted for inflation using the All Items CPI

Source: IRI/Mintel

Sales growth through drug stores is similar to that seen in supermarkets, though growth at constant 2002 prices has been higher, at 8% compared to 2%. The success of many of the same products has driven growth through the channel—like John Frieda in gels and mousses and TRESemmé in hair sprays—but more than was seen in food stores, the growing presence of salon-quality brands like TIGI's Bed Head line, Sebastian Shaper and John Paul Mitchell Systems sculpting products accounts for a large portion of growth.

Figure 18 shows the top drug store retailers by sales for 2001 and 2002.

Figure 18 Top drug store retailers by sales, financial years ending 2001 & 2002

Company Name (latest fiscal year end)	Sales 2001 $million	Sales 2002 $million	Change 2001-2002 %
CVS (12/29/01)	20,087	22,241	11.0
Rite Aid (3/2/02)	14,516	15,171	4.5
Walgreens (8/31/01)	21,207	24,600	16.0
Eckerd (1/31/02)	12,477	13,088	5.3
Medicine Shoppe (6/30/02)	1,549	1,890	18.1
Longs (1/31/02)	4,027	4,305	6.9
Brooks (6/31/02)	1,289	1,463	13.5
Duane Reade (12/29/01)	1,000	1,144	14.4
Drug Emporium (12/30/00)	905	875	-3.4
Total	**77,057**	**84,777**	**10.0**

Source: Edgar Online/Mintel

MASS MERCHANDISERS

Figure 19 shows sales of hair styling products in mass merchandisers between 1997 and 2002.

Figure 19 Mass merchandiser sales of hair styling products, 1997-2002

Year	Sales at current prices			Sales at constant 2002 prices*		
	$million	Index	% change	$million	Index	% change
1997	149.9	100	-	170.4	100	-
1998	160.3	107	6.9	179.4	105	5.3
1999	165.0	110	2.9	180.6	106	0.7
2000	176.0	117	6.7	186.4	109	3.2
2001	187.0	125	6.3	192.6	113	3.3
2002 (est.)	190.9	127	2.1	190.9	112	-0.9

Note: Data exclude Wal-Mart
* adjusted for inflation using the All Items CPI

Source: IRI/Mintel

Clearly, mass merchandisers have outperformed both food stores and drug stores in terms of sales growth. While they represent the smallest share of sales, hair styling products have grown a solid 12% at constant 2002 prices. Sales have been driven by the same manufacturers who drove sales in the other two channels, but year-on-year increases are likely more notable due to a higher percentage of consumers shopping mass merchandisers for their personal care products as a whole.

Though mass merchandisers appear to account for the smallest percentage of sales, this is more due to the absence of Wal-Mart sales data (as the largest mass merchandiser in the U.S.) than nonperformance on the part of mass merchandisers. In fact, Mintel's research found that nearly a third of women surveyed who use hair styling products purchase products at mass merchandisers.

Figure 20 shows the top mass merchandiser retailers, by sales for 2001 and 2002.

Figure 20 Top mass merchandiser retailers, by sales, 2001 & 2002

Store name (latest fiscal year end)	Sales 2001 $bn	Sales 2002 $bn	Change 2001-2002 %
Wal-Mart (1/31/02)	121.9	139.1	14.1
Costco (8/31/01)	34.1	37.9	11.0
Kmart (1/31/02)	37.0	36.2	-2.2
Target (1/31/02)	36.9	39.9	8.1
SAM'S CLUB (1/31/02)	26.8	29.4	9.7
BJ's Wholesale (1/31/02)	4.9	5.3	8.2
Total	**261.6**	**287.8**	**10.0**

Source: Edgar Online/Mintel

OTHER STORES

Beauty supply stores hold the enviable position of attracting both those consumers looking to save money on salon-quality products at lower prices and ethnic consumers looking for a wider variety of product than is typically found in FDM stores. As is further detailed in the Consumer section, one in five female styling product users buys her products at a beauty supply store, the second most widely cited outlet, following mass merchandisers.

According to Mintel's own research, some 12% of women who use styling products say they purchase them from a salon, but since these products are typically 3-4 times the cost of similar products found in FDM channels, they understandably account for a larger share of overall retail sales of hair styling products. However, because salons sales figures are not effectively tracked, Mintel is not able to accurately estimate the extent of the role of this type of outlet in the market.

THE CONSUMER

Mintel is able to offer further analysis of its exclusive research, tailored to individual clients' needs. It is possible, for example, to net and/or combine codes to create new attitudinal, usage or demographic groups, and cross-analysis can show how the answers to any questions or categories are related.

For further details and prices, please call the editorial team at 312.932.0400.

INTRODUCTION

For the purposes of this report, Mintel commissioned exclusive consumer research through ICR to explore consumer usage of and attitudes towards hair styling products Fieldwork was conducted in July 2002 among a nationally representative sample (weighted against the total population for estimation) of 1,002 adults aged 18 and older.

Mintel has also analyzed data from the Fall 2001 Simmons Teens Survey. The survey was carried out from October 2000-September 2001 among a sample base of 2,701 teens aged 12-17, with results weighted to represent the U.S. population.

Mintel has looked at responses by various demographic factors such as age, race/ethnicity, household income and geographic location to give a consumer perspective and analyze usage and shopping trends. Analysis is only presented where significant differences are apparent.

SPECIFIC STYLING PRODUCTS USED BY WOMEN

Given that women account for the majority of users and purchasers of hair care products, the following sections focus on a sample of women only, exploring their use and purchase of hairstyling products.

Mintel's exclusively commissioned survey first asked the following question of 505 women:

"Which, if any, of the following hair styling products do you ever use?"

The topline results are presented in Figure 21.

Figure 21 Hair styling products used, women, July 2002

Base: 505 women aged 18 and over

	All %
Any (net)	**79**
Hair spray or spritz	51
Gel or mousse	36
Oil sheen spray or shine products	13
Hair and scalp moisturizers	10
Setting/wrap lotions	7
Pomades or waxes	7
None	21

Source: Mintel/ICR

With almost 8 out of ten women using hairstyling products (79%), there is still margin for increasing the market by bringing additional users in; the further potential becomes clear considering the individual product groups. In particular, while the sales of hair spray are not expected to show any growth, it is also probably the case that penetration is not likely to grow. Conversely, penetration for the other products discussed here has good growth potential, and level of usage will likely hinge on consumer education and product trial.

The results are analyzed by household income in Figure 22.

Figure 22 Hair styling products used, women, by household income, July 2002

"Which, if any, of the following hair styling products do you ever use?"

Base: 505 women aged 18 and over

	All %	Under $25K %	$25K-49.9K %	$50K+ %
Any (net)	79	78	76	90
Hair spray or spritz	51	48	49	60
Gel or mousse	36	39	31	50
Oil sheen spray or shine products	13	11	12	17
Hair and scalp moisturizers	10	9	12	16
Setting/wrap lotions	7	9	9	8
Pomades or waxes	7	2	6	14
None	21	22	24	10

Source: Mintel/ICR

Incidence of use of all products, except setting/wrap lotions, increases as household income increases. Reasons for this are probably that higher income households will more likely have dual incomes, and, as shown previously, working women have a higher likelihood of spending more on personal care, and hair care products. These data clearly show that women with higher household incomes are more likely to buy virtually all hair styling products.

Of particular interest, though, is that research for Mintel's *Hair Styling Appliances* report (consumer intelligence—U.S. Report, February 2002) showed that female respondents with lower household income spent more time styling their hair, indicating that women with lower income would rather spend the time styling with appliances than spend the money to style with products.

The results are analyzed by race of respondent in Figure 23.

Figure 23 Hair styling products used, women, by race, July 2002

"Which, if any, of the following hair styling products do you ever use?"

Base: 505 women aged 18 and over

	All %	White %	Black* %
Any (net)	79	77	88
Hair spray or spritz	51	57	11
Gel or mousse	36	39	38
Oil sheen spray or shine products	13	8	54
Hair and scalp moisturizers	10	7	42
Setting/wrap lotions	7	5	26
Pomades or waxes	7	7	8
None	21	23	12

* small subsample

Source: Mintel/ICR

Reinforcing findings shown in Figure 23, hair spray or spritz is more widely used by white respondents than by blacks, for reasons previously mentioned—the differences in hair texture as well as the drying effects of the alcohol most often found in hair spray.

Usage of gels and mousses, however, is nearly identical between the two groups as these products tend to be used to shape styles, add shine and control frizz—hair concerns relevant to both groups.

Usage of the remaining product categories products split along ethnic lines: oil sheen spray or shine products, hair and scalp moisturizers, and setting wraps and lotions are largely marketed to black consumers to address specific hair care styling needs and care concerns, including damage caused by braiding and chemical treatments such as relaxers. Therefore, usage of these products tends to rank very high among blacks respondents relative to whites.

Pomades and waxes, while marketed to both ethnic groups, are used by similar, relatively low, proportions of each.

The results are analyzed by geographic location of respondent in Figure 24.

Figure 24 Hair styling products used, women, by region, July 2002

"Which, if any, of the following hair styling products do you ever use?"

Base: 505 women aged 18 and over

	All %	Northeast %	North Central %	South %	West %
Any (net)	79	86	69	82	79
Hair spray or spritz	51	49	46	53	56
Gel or mousse	36	40	29	41	30
Oil sheen spray or shine products	13	19	6	16	11
Hair and scalp moisturizers	10	13	11	9	10
Setting/wrap lotions	7	16	3	6	7
Pomades or waxes	7	4	4	10	7
None	21	14	31	18	21

Source: Mintel/ICR

Hair styling product usage varies somewhat between geographic regions, in part due to differences in population (for example, race and ethnicity breakdown), weather conditions, and hair style trends. According to the U.S. Census Bureau, 18.9% of the total population in the South is black, and 11.4% in the Northeast, followed by 10.1% in the Midwest, and 4.9% in the West.

In the South, where humidity levels are highest throughout much of the year, products used for taming unruly hair (waxes and pomades, gel and mousse) are the most popular among respondents (53%). According to a nationwide survey on styling trends conducted by *Glamour* magazine, Southern readers are also more likely to go for "cuts shaped with rollers, long curls and volume," styles that are likely to use gels or mousses (53%) to achieve the desired effect.

Mintel's *Hair Styling Appliances* report found that respondents in the South report a higher incidence of regular usage of a hair dryer than do respondents in other regions. This may correlate with a relatively high use of hair spray (53%) in this region to "finish" the blown styles.

In the Northeast, 11.4% of the population is black (the second highest concentration of blacks in the U.S., according to the U.S. Census Bureau), which may help to explain why this region has the highest usage levels of oil sheen spray/shine products, hair and scalp moisturizers, and setting/wrap lotions among respondents. As previously noted, these products are traditionally marketed to and purchased by black consumers.

Also according to Mintel's *Hair Styling Appliances*, respondents in the Northeast take more time than do those in other regions to style their hair. This longer styling time may indicate that these women are using more appliances and/or products than are other respondents, which would correspond with figures above showing that 86% of respondents in the Northeast use hair styling products, far higher than the average.

The results are analyzed by metro status in Figure 25.

Figure 25 Hair styling products used, women, by metro status, July 2002

"Which, if any, of the following hair styling products do you ever use?"

Base: 505 women aged 18 and older

	All %	Metro %	Non-metro %
Any (net)	79	81	71
Hair spray or spritz	51	49	51
Gel or mousse	36	39	30
Oil sheen spray or shine products	13	15	9
Hair and scalp moisturizers	10	12	5
Setting/wrap lotions	7	7	9
Pomades or waxes	7	9	3
None	21	19	29

* small subsample

Source: Mintel/ICR

Variances in products used by metropolitan status are to be expected, in part due to differences in hair styles from metro to non-metro areas. In terms of oil sheen and moisturizers, Figure 24 showed a heavier incidence of use of these products among black respondents, and blacks have traditionally made up a larger percentage of metro dwellers than they do non-metro dwellers.

SOURCE OF PURCHASE

Mass merchandisers are rapidly becoming a "one stop shop" for consumers looking to save money and time by purchasing a wide variety of products in one location. Department stores, specialty stores, and nonretail outlets are finding the need to compete by differentiating their offerings or level of customer service. The impact of the success of the mass merchandiser is apparent in the following data.

To determine where respondents go to buy hair styling products, Mintel's survey asked the following question:

"At what type of store do you most often buy your hair styling products?"

The topline results are presented in Figure 26.

Figure 26 Where hair styling products are bought, women, July 2002

Base: 402 women aged 18 and over who use hair styling products

	All %
A mass merchandiser	32
A beauty supply shop	20
A drug store	19
A grocery store	15
A salon	12
Don't know/refused	1

Source: Mintel/ICR

Consumers are turning to mass merchandisers for a wide variety of purchases and hair styling products are no exception.

A third of women interviewed most often bought hair styling products at the mass merchandiser, giving these outlets by far the dominant position in terms of consumer penetration. Given that 15-20% of respondents most often bought at either a beauty supply shop, drug store or grocery store shows little real difference in terms of preference. It is interesting to note however that given their relative numbers, and the fact that they are not going to be visited as part of another shopping trip, beauty supply shops would appear to have a strong market position.

The results are analyzed by age of respondent in Figure 27.

Figure 27 Where hair styling products are bought, women, by age, July 2002

"At what type of store do you most often buy your hair styling products?"

Base: 402 women aged 18 and over who use hair styling products

	All %	18-34 %	35-54 %	55+ %
A mass merchandiser	32	30	35	32
A beauty supply shop	20	22	21	17
A drug store	19	14	17	29
A grocery store	15	21	12	11
A salon	12	11	13	11

Source: Mintel/ICR

For all ages, respondents were most likely to visit a mass merchandiser. Most significant from these data are the fact that the beauty supply shops and grocery stores are clearly more likely to be used by younger respondents, whereas the reverse is true for drug stores. This suggests a warning for the drug stores because although they can rely on the swell of numbers of older people through 2010, in the longer run they need to attract younger consumers.

These data support results found in *Hair Styling Appliances*, with respondents aged 35-54 most often shopping for hair styling appliances at mass merchandisers, while younger respondents were more likely than older to go to beauty supply stores and older respondents bought their appliances at drug stores. It stands to reason that consumers would look in the same places for all their hair styling needs.

The fact that younger respondents are significantly more likely to buy at a grocery store than are their older counterparts may be a result of time considerations, (i.e. they are picking up styling products while they are in the store buying groceries,) or budgetary considerations, where grocery stores offer better prices. This would also explain why a higher percentage of younger respondents don't buy their products at a salon, despite the fact that salons typically carry more "cutting edge" products directed toward a younger consumer.

The results are analyzed by household income in Figure 28.

Figure 28 Where hair styling products are bought, women, by household income, July 2002

"At what type of store do you most often buy your hair styling products?"

Base: 402 women aged 18 and over who use hair styling products

	All %	Under $25K %	$25K-49.9K %	$50K+ %
A mass merchandiser	32	34	32	34
A beauty supply shop	20	18	25	22
A drug store	19	21	18	15
A grocery store	15	20	18	7
A salon	12	6	7	22

Source: Mintel/ICR

Regardless of income, respondents are nearly equally as likely to buy their hair styling products from a mass merchandiser.

With this exception, the differences in source of purchase by household income show a predictable pattern. With increases in income comes a higher likelihood of buying from a salon or beauty supply shop, conversely those with lower incomes are more likely to purchase from a drug or grocery store.

The results are analyzed by race in Figure 29.

Figure 29 Where hair styling products are bought, women, by race, July 2002

"At what type of store do you most often buy your hair styling products?"

Base: 402 women aged 18 and over who use hair styling products

	All %	White %	Black* %
A mass merchandiser	32	35	5
A beauty supply shop	20	12	68
A drug store	19	22	8
A grocery store	15	15	14
A salon	12	14	5

* small subsample

Source: Mintel/ICR

Though the subsample is small, it is clear that beauty supply shops are the most popular among black respondents. This is most likely because mainstream retailers do not carry a wide selection of black hair care products, except in areas with a majority black population. Neighborhood beauty supply stores typically carry a wider selection of products specifically designed for black hair, and unlike chains that require highly involved processes to change what appears on the shelves, beauty supply stores are better able to change the product mix to meet the consumer's demand.

HOW PURCHASE CHOICES ARE MADE

To further understand respondents' hair styling product use, Mintel asked respondents the following question regarding which factors influence their purchasing decisions:

"Which one of the following is most important to you when choosing a hair styling product?"

Only single responses were allowed. Topline results are shown in Figure 30.

Figure 30 Most important factor in choosing hair styling products, women, July 2002

Base: 402 women aged 18 and over who use hair styling products

	All %
Price	25
Product claims	23
Brand name	21
Ingredients (natural/organic)	17
Fragrance	9
Hairdresser's recommendation	2
Or something else	2
Don’t know/refused	3

Source: Mintel/ICR

Though price does play a role in the purchase of hair styling products, and it was the single factor most often mentioned, it is not the overwhelming factor for most respondents.

While a quarter of respondents said price is the most important consideration in their purchasing habits, nearly the same percentage cited product claims (23%) and brand name (21%) as most important.

These results would reflect the fact that there are numerous issues involved in the buying decision. In the promotion of hair styling products manufacturers clearly have no easy choice as to which characteristics to focus on.

The results are analyzed by household income in Figure 31.

Figure 31 Most important factor in choosing hair styling products, women, by household income, July 2002

"Which one of the following is most important to you when choosing a hair styling product?"

Base: 402 women aged 18 and over who use hair styling products

	All %	Under $25K %	$25K-49.9K %	$50K+ %
Price	25	28	42	16
Product claims	23	19	18	34
Brand name	21	16	21	17
Ingredients (natural/organic)	17	21	13	14
Fragrance	9	13	3	8
Hairdresser's recommendation	2	-	1	5
Or something else	2	-	1	5

Source: Mintel/ICR

As would be expected the most important factors in making purchase decisions vary significantly by household income. Over four in ten respondents with household income of $25K-49.9K says that price is the most important factor compared to just a quarter of respondents on average. For a single person with this income, price may be less of a factor, but if these respondents have families, buying expensive hair care products may be lower on their list of priorities.

Respondents in the highest income bracket cited product claims as the factor most important to them. With higher income, they may be better able to afford to try products with added benefits, which typically come with higher price tags.

Of note is the fact that those respondents with the lowest household incomes were significantly more likely than any other group to mention fragrance, and, to a lesser extent, ingredients.

The results are analyzed by race in Figure 32.

Figure 32 Most important factor in choosing hair styling products, women, by race, July 2002

"Which one of the following is most important to you when choosing a hair styling product?"

Base: 402 women aged 18 and over who use hair styling products

	All %	White %	Black* %
Price	25	27	17
Product claims	23	21	23
Brand name	21	21	26
Ingredients (natural/organic)	17	15	33
Fragrance	9	11	-
Hairdresser's recommendation	2	2	1
Or something else	2	2	-

* small subsample

Source: Mintel/ICR

Though these data should be read with caution since due to the small black subsample, ingredients, brand name and product claims all outweigh price in black respondents' styling product purchase decisions. This indicates that while price may be important, black respondents are most influenced by the product itself, and supports findings that show that black women spend more on hair care products than their white counterparts.

Cross-tabulation—most important factor in choosing product by where products are bought

Most important factor in purchase decision is examined by where products are bought in Figure 33.

Figure 33 Most important factor in choosing hair styling products, women, by where products are bought, July 2002

"Which one of the following is most important to you when choosing a hair styling product?"

cross-tabulated by

"At what type of store do you most often buy your hair styling products?"

Base: 402 women aged 18 and over who use hair styling products

	All %	Grocery store* %	Drug store %	Mass merch. %	Salon* %	Beauty supply shop %
Price	25	36	20	36	8	14
Product claims	23	3	12	27	35	35
Brand name	21	34	33	11	19	15
Ingredients (natural/ organic)	17	6	18	14	20	24
Fragrance	9	21	13	8	3	2
Hairdresser's recommendation	2	-	-	-	4	5
Or something else	2	-	1	-	8	2

* small subsample

Source: Mintel/ICR

Factors influencing respondents' purchasing habits change depending upon where the purchase is being made. For respondents shopping at mass merchandisers or grocery stores, price is cited as a concern by 36% of respondents, as compared to just 20% and 14% of shoppers at drug stores and beauty supply stores, respectively. This comes as no surprise as cost savings has been the premise for mass merchandisers' success.

Practicality, in terms of product claims, is cited as most important by 35% of respondents who shop at salons and beauty supply stores, much more than the other outlet types. In the case of the latter, because they also trade to professionals, the shopper may believe this to be a better source. Ingredients are also important to 24% of respondents who shop beauty supply stores. This is perhaps because beauty supply stores are most likely to carry pricier niche styling products that feature organic and natural ingredients.

One-third (33%) of respondents said brand is important in their purchasing decision when shopping at drug stores. Historically, drug stores have been the place where shoppers purchase styling products and though some of that traffic has been lost to mass merchandisers and other outlets, drug store shoppers appear to remain loyal.

PRODUCT PURCHASE BEHAVIOR

In addition to determining which factors are most important in making purchase decisions, the Mintel survey also sought to identify what attitudes influence respondents' buying behavior. To this end, Mintel asked women who use hair styling products the following:

"Please tell me whether you agree or disagree with each of the following statements."

Topline results are show in Figure 34.

Figure 34 Product purchase behavior, women, agree summary, July 2002

Base: 402 women aged 18 and over who use hair styling products

	Agree with statement %
I usually buy products specifically designed for my hair type	85
I think that more expensive products work better than lower-priced ones	18
I usually stick to the same brands for my hair styling products	72

Source: Mintel/ICR

Some 85% of respondents say they buy products specifically designed for their hair type, which indicates that the consumer is aware of the different needs of her particular hair type, and looks favorable for manufacturers who position their products in this way.

The fact that nearly three quarters of respondents report that they usually stick to the same brands for products but that only 21% cite brand name as most important in their purchase process (see Figure 34), suggests a number of things. Most likely it is not the actual brand that is key to the decision, but other aspects of the brand (price, functionality, known product) that are being considered.

Less than one in five respondents agree that more expensive products work better than lower-priced ones, which bodes well for FDM sales, and is clearly a factor at play in the growth of mass merchandiser sales.

Results are analyzed by age of respondent in Figure 35.

Figure 35 Product purchase behavior, women, by age, July 2002

"Please tell me whether you agree or disagree with each of the following statements."

Base: 402 women aged 18 and over who use hair styling products

	All %	18-34 %	35-54 %	55+ %
You usually buy products specifically designed for your hair type	85	88	83	83
You think that more expensive products work better than lower-priced ones	18	22	18	10
You usually stick to the same brands for your hair styling products	72	67	72	78

Source: Mintel/ICR

Younger respondents are significantly more likely than are older respondents to say that they think more expensive products work better. While this perception may be based on actual experience with a product, it may also be a factor of product positioning and successful marketing. The debate over the relative performance of the cheaper and the more expensive hair care product is frequently a subject of copy in magazines like *Allure*, *Lucky*, and *Glamour*—magazines that appeal to women in the 18-34 age group. These regularly feature product comparisons that show lower priced products that perform similarly to more expensive ones.

While some two thirds of respondents aged 18-34 appear to be brand loyal, older respondents are more likely to be so—as it would appear from these results that younger women are more willing to try new products and may switch more often than older respondents who are likely set in their styling regimens.

Results are analyzed by household income in Figure 36.

Figure 36 Product purchase behavior, women, by household income, July 2002

"Please tell me whether you agree or disagree with each of the following statements."

Base: 402 women aged 18 and over who use hair styling products

	All %	Under $25K %	$25K-49.9K %	$50K+ %
You usually buy products specifically designed for your hair type	85	82	88	88
You think that more expensive products work better than lower-priced ones	18	15	15	25
You usually stick to the same brands for your hair styling products	72	75	73	71

Source: Mintel/ICR

Respondents overwhelmingly buy products specifically designed for their hair type, regardless of income, indicating that there are products on the market that fit consumers' needs at any price point.

A quarter of respondents with higher household income report that they think more expensive products work better, compared to only 15% of those with household income of less than $50K. These women are likely in a better position to be able to compare products, though some may be under the same impressions as younger respondents—that more expensive products inherently must perform better.

Cross-tabulation—product purchase behavior by where products are bought

Results are analyzed by purchase location in Figure 37.

Figure 37 Product purchase behavior, women, by where products are bought, July 2002

"Please tell me whether you agree or disagree with each of the following statements."

cross-tabulated by

"At what type of store do you most often buy your hair styling products?"

Base: 402 women aged 18 and over who use hair styling products

	All %	Grocery store* %	Drug store %	Mass merch. %	Salon* %	Beauty supply shop %
You usually buy products specifically designed for your hair type	85	82	83	82	89	92
You think that more expensive products work better than lower-priced ones	18	21	15	17	26	16
You usually stick to the same brands for your hair styling products	72	72	66	76	80	71

* small subsample

Source: Mintel/ICR

Women respondents who buy at the salon or beauty supply shop are significantly more likely than those buying at the other outlets to buy products specifically for their hair type. Further, salon visitors show a greater likelihood of considering that more expensive products work better, and stick with the same products. It would appear that picking the products up at the salon is more than just a convenience for them. While those shopping at the beauty supply stores are interested in getting the right product for their hair, they are less likely than others to see the value in more expensive products. These findings are very much what would be expected, and they provide strong evidence to suggest that the motivations behind the purchase decisions for each type of shopper are quite different.

MEN'S STYLING PRODUCTS USE

Clearly, hair styling product usage is not limited to women. To further clarify to what extent men use styling products, Mintel asked 507 men the following question:

Which, if any, of the following hair styling products do you ever use?

The topline results are presented in Figure 38.

Figure 38 Hair styling products used, men, July 2002

Base: 507 men aged 18 and over

	All %
Any (net)	28
Gel or mousse	15
Hair spray or spritz	12
Oil sheen spray or shine products	3
Pomades or waxes	2
Hair and scalp moisturizers	2
Setting/wrap lotions	1
None	72

Source: Mintel/ICR

Less than a third of male respondents report using any of the prelisted styling products, but as would be expected, gel or mousse usage just barely tops that of hair spray or spritz as the most widely used product. If nothing else these data reinforce the fact that men are very much a part of the market for hair styling products.

The results are analyzed by age of respondent in Figure 39.

Figure 39 Hair styling products used, men, by age, July 2002

Which, if any, of the following hair styling products do you ever use?

Base: 507 men aged 18 and over

	All %	18-24* %	25-34 %	35-44 %	45-54 %	55-64* %	65+ %
Any (net)	28	41	25	31	24	27	23
Gel or mousse	15	38	18	21	3	7	7
Hair spray or spritz	12	4	10	10	18	18	13
Oil sheen spray or shine products	3	-	3	5	3	6	1
Pomades or waxes	2	1	3	3	2		
Hair and scalp moisturizers	2	3	-	2	2	-	1
Setting/wrap lotions	1	-	-	2	-	-	-
None	72	59	75	69	76	73	77

* small subsample

Source: Mintel/ICR

Though the sample is small, four out of ten respondents aged 18-24 say they use any of the listed products, compared to just a little more than a quarter on average, and are significantly more likely to report using a gel or mousse than their older counterparts.

Additionally, nearly a fifth of respondents aged 45-64 use hair spray—maybe they're just not aware of the other styling products that might give them the same holding results since they have grown up with hair spray. Gels and mousses also carry a younger, more hip image that older respondents may not relate to. There would appear to be potential here for growth in the gel and mousse market, a move that would likely further add to the demise of hair spray sales.

The results are analyzed by household income in Figure 40.

Figure 40 Hair styling products used, by men, by household income, July 2002

Which, if any, of the following hair styling products do you ever use?

Base: 507 men aged 18 and over

	All %	Under $25K %	$25K-49.9K %	$50K+ %
Any (net)	28	21	30	33
Gel or mousse	15	13	16	14
Hair spray or spritz	12	7	13	14
Oil sheen spray or shine products	3	-	6	2
Pomades or waxes	2	2	-	4
Hair and scalp moisturizers	2	2	2	1
Setting/wrap lotions	1		-	1
None	72	79	70	67

Source: Mintel/ICR

Just as among women, there are notable differences in use of hair styling products among respondents in lower and higher income groups, with only a fifth of men with household income of less than $25K reporting that they use any of the prelisted products, compared to a third of those with income of $50K or more. Despite this difference, nearly equal percentages say they use gel or mousse. Many of these differences will also reflect age, assuming that older respondents are more likely to be earning more.

Notably, twice the percentage of those with household income of more than $25K say that they use hair spray or spritz than do those with income of less than $25K. This again is likely age related, though it may also be an indication that more opportunities exist to get those with higher household income to buy more expensive styling products that do the same things, but maybe have a different image than does hair spray.

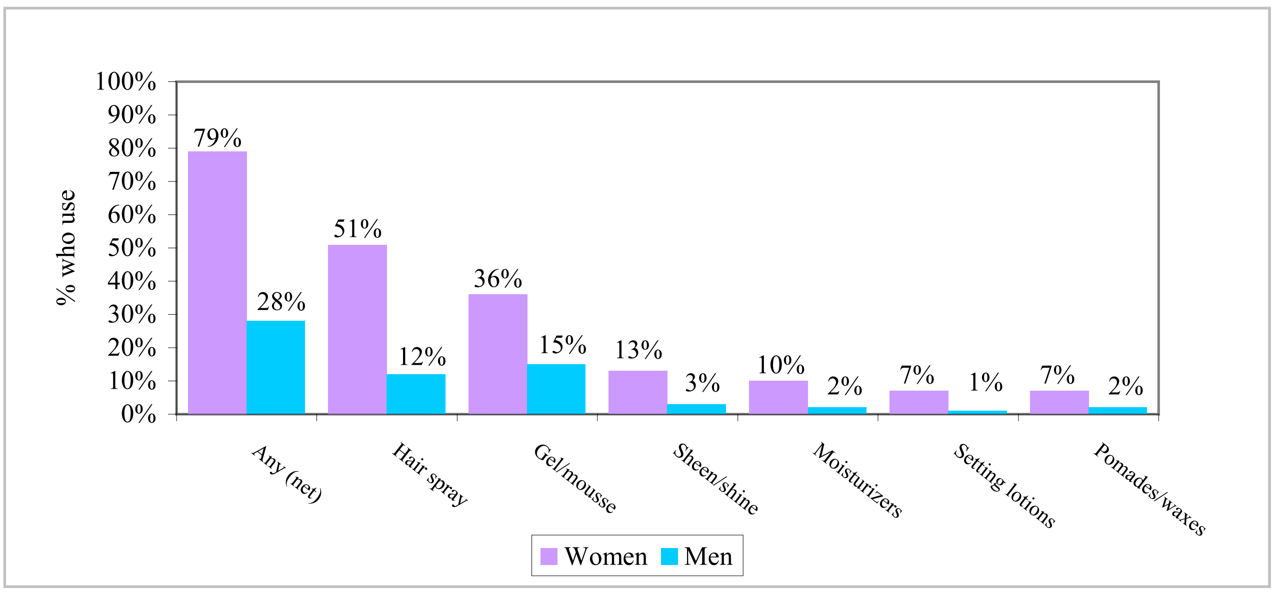
COMPARISON OF WOMEN'S AND MEN'S PRODUCT USE

For purposes of comparison, the following charts are included to show the difference in incidence of usage of hair styling products among female and male respondents, according to Mintel's research.

These graphs are based on data presented earlier in this section, and for which commentary has already been provided.

Graph 4 compares usage of all styling products.

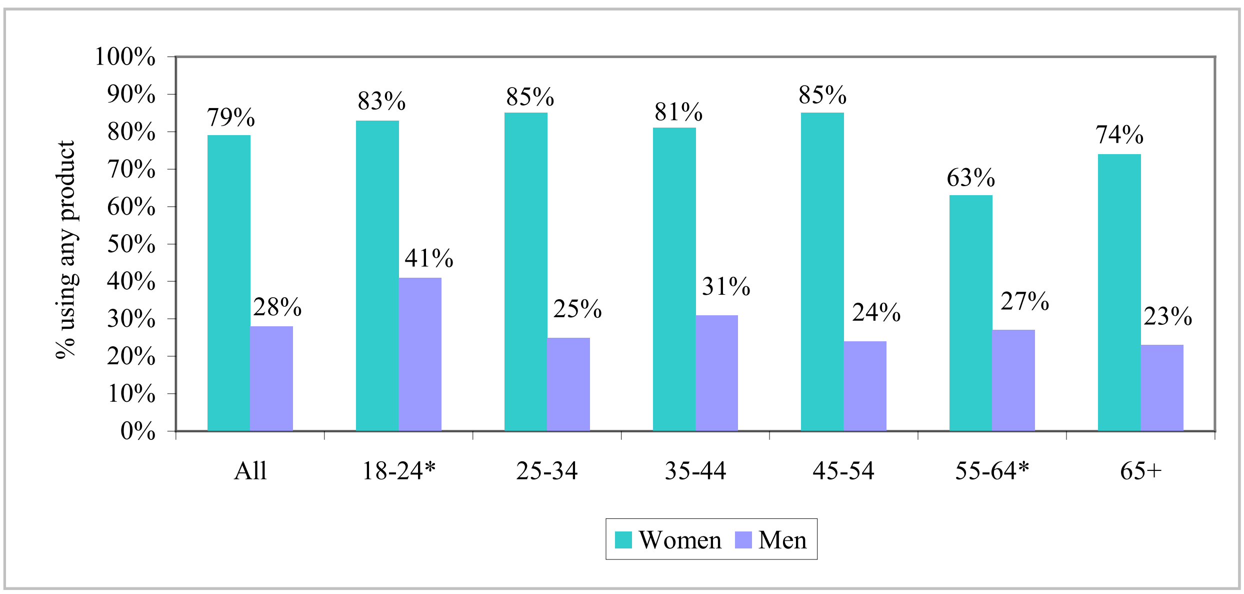
Graph 4 Hair styling products used, by product type, men vs women, July 2002



Source: Mintel/ICR

While data was examined by a number of demographic factors, age is the most significant factor where male respondent usage mirrored that of female respondents, as shown in Graph 5.

Graph 5 Hair styling products used, by age, men vs women, July 2002



Source: Mintel/ICR

TEENS' STYLING PRODUCT USE

Teens are an important part of the hair styling products market as they wield increasingly more buying power, as mentioned in the Market Drivers section of this report. Many of the new products to enter the market have been positioned with the younger consumer in mind—products that create spiky or extreme styles, include glitter, or even glow in the dark.

To determine the level to which teens use hair styling products, Mintel analyzed results of the following question from the Fall 2001 Teens survey:

"Which of the following do you ever use?"

Topline results are presented in Figure 41.

Figure 41 Teen styling product use, October 2000-September 2001

Base: 2,701 teens aged 12-17

	All %	Male %	Female %
Use any (net)	63	57	70
Hair spray/spritz	41	28	55
Hair styling creams, gels, lotions	51	49	54

Source: Mintel/Fall 2001 Simmons Teens

Overall, nearly two thirds of teens surveyed use either of the hair spray or other styling products, but, unlike among adults, where Mintel's research found that women surveyed were nearly three times more likely to use any of the prelisted hair styling products, the gap between teen males and females is much smaller. Manufacturers experiencing declining sales as older men leave the styling products market will find a more receptive audience among young men.

As would be expected, the teenaged males were most likely to use gels over hair spray, given the old-fashioned or feminine image of hair spray and the wide variety of other styling products available to create the hair styles popular with young men.

Additionally, according to the Fall 2001 Simmons Kids survey, some 39% of the children aged 6-11 surveyed say they use hair styling creams/gels/lotions/tonics. Though the parents will likely be making the purchases, these children wield considerable influence in what is bought and manufacturers may find this group a viable target for expanding the market.

FUTURE & FORECAST

FUTURE TRENDS

Sales of styling products are influenced largely by trends in hairstyles. Today there is a wider variety of hair styles than ever before—from very sculptured, cropped looks, to longer, looser styles. As a result there is room in the market for a wide range of styling products both to suit the consumer who stays with the same style, and those who wish to make regular changes. Opportunities exist for the sale of multiple products to each individual to suit their immediate and changing needs. Because of the increasing range of hair care products, it is likely that many consumers will be unaware of the options available to them, and likely unfamiliar with the benefits of each product or product type. Further education and trial encouragement will be a key route to further sales.

New formats stimulate interest

Mousses, gels and styling sprays will remain the most popular type of styling product, particularly among consumers loyal to these formats. However, new technology will continue to feed a large number of different product formats onto the market. The popularity of products such as styling mud, paste and water will only continue if they offer genuine performance benefits that encourage consumers to continue buying.

Designer hair care brands set trends

Existing mass-market brands will come under pressure from the increasing number of new designer hair care ranges that are launching into FDM. These include the likes of Charles Worthington, John Frieda, and Paul Mitchell, each of which have a reputation for spotting hairstyling trends and producing hair care products to match.

While the presence of these products increases competition in FDM outlets, they also present a challenge to salon brands. In tight economic times, while a large portion of consumers may see buying upscale hair care products as an allowable luxury, others may seek out lower price products that promise the same results.

Targeting men

Mint*el*'s exclusive research found that younger male respondents, those aged 18-24, are significantly more likely than their older counterparts to report that they use any type of hair styling product: 41% compared to 28% of all male respondents. Though the subsample was small, trends in the market point to a number of manufacturers recognizing this fact. Male-specific product lines like American Crew, as well as products designed specifically for men, like JPMS's XTG-Extreme Thickening glue and Dep's Sport Endurance pomade, are bound to increase men's interest in the styling market as they shake off the male perception that these types of products are for women. Styling product manufacturers must ensure that they have ranges for both sexes—whether gender-specific separate or single unisex lines—perhaps using advertising and point-of-sale material to make this clear.

Hair sprays will continue to decline

Hair sprays have been losing popularity for some years, overtaken by more contemporary and multifunction styling products that offer both style and hold. That said, many older women (and older men, according to Mintel's exclusive consumer research) will continue to use hair sprays, if only because they are habitual and loyal users. The market for hair sprays will remain important for some time, particularly for dedicated brands such as Rave and Aqua Net. Although the number of older consumers is predicted to increase to 2010—the portion of the population aged 45-64 is expected to grow at three times the rate of the total population through 2010, up 17% between 2000 and 2005, and 11.2% between 2005 and 2010—this may not necessarily result in sales growth for hair sprays as many of these consumers will have grown older using styling mousses and styling sprays, and will continue to do so.

Styling products and the aging consumer

Some consumers may experience specific problems with their particular hair type. For example, older users often find that hair becomes more difficult to style because of coarseness, dryness and/or loss of shine. Between 1995 and 2000 the numbers of those over 54 rose by 4.1 million; over the next five years there will be 7.2 million more people in this age group.

With over 66 million Americans aged 55+ in 2005, there will be plenty of opportunities for the market to address. However, manufacturers will have to overcome persistent brand loyalty/habitual use of styling products by the older segment if they are to take full advantage of the purchasing power of this group.

Shrinking teenage population

The previously-mentioned rapid expansion of the teenage market will slow in coming years and will decline 2005-2010, as shown in Figure 42, which features population projections by age for 2000-2010.

Figure 42 U.S. population projections, by age, 2000-2010

	2000		2005		2010		Change 2000-2005	Change 2005-2010
	000	%	000	%	000	%	%	%
0-4	18,865	6.9	19,212	6.7	20,099	6.7	1.8	4.6
5-9	19,781	7.2	19,122	6.6	19,438	6.5	-3.3	1.7
10-14	19,908	7.2	20,634	7.2	19,908	6.6	3.6	-3.5
15-19	19,897	7.2	20,990	7.3	21,668	7.2	5.5	3.2
10-19 (net)	**39,805**	**14.5**	**41,624**	**14.5**	**41,576**	**13.9**	**4.6**	**-0.1**
20-24	18,518	6.7	20,159	7.0	21,151	7.1	8.9	4.9
25-34	37,441	13.6	36,933	12.8	38,851	13.0	-1.4	5.2
35-44	44,894	16.3	42,716	14.8	39,443	13.2	-4.9	-7.7
45-54	37,166	13.5	41,891	14.6	44,161	14.7	12.7	5.4
55-64	24,001	8.7	29,690	10.3	35,429	11.8	23.7	19.3
45-64 (net)	**61,167**	**22.2**	**71,581**	**24.9**	**79,590**	**26.5**	**17.0**	**11.2**
65+	34,837	12.7	36,372	12.6	39,715	13.2	4.4	9.2
Total	**275,306**	**100.0**	**287,716**	**100.0**	**299,862**	**100.0**	**4.5**	**4.2**

Note: Data may not equal totals due to rounding

Source: U.S. Census Bureau, Current Population Reports and Projections of the Resident Population by Age, Sex, Race, and Hispanic Origin, 2000 to 2010. Calculations by Mintel

Estimates show that the teen population (ages 10-19) will grow only slightly, following 4.6% growth from 2000-2005, with a 0.1% decline from 2005-2010.

This decline could directly affect hair styling product manufacturers. As Mintel's exclusive research has shown, older users are more likely to stick with tried-and-true brands and formats (particularly in the hair spray category), while younger users more readily adopt "experimental" products such as gels, pastes and muds. A decline in the teen population will have implications for the potential growth of sales of existing and as-yet undeveloped styling products targeted at this market.

Growing minority populations

While many minority groups will continue to have population gains over the rest of the century, black populations in particular remain the ones to watch in terms of growth potential for the hair styling products market.

According to Census Bureau population estimates, the black population is expected to increase 6.5% by 2005 over 2000, and by 2010 the segment is expected to have grown by 6.3% over 2000 levels. Additionally, according to the Selig Center for Economic Growth at the University of Georgia, minority spending in 2001 was estimated at $860 billion, with black consumers accounting for $572 billion.

Black consumers tend to have specific hair needs, as their hair is often brittle, prone to breakage and lacking in moisture. While this market has historically been dominated by smaller, black-owned businesses, in 2001 John Frieda introduced (and found great success with) the Relax line, an extension of its hugely popular Frizz-Ease brand; and L'Oréal has made no secret of its extensive research and development in this area. It is likely that other major companies will make efforts to target this growth segment.

As previously noted, the once rapidly expanding teen population will shrink from 2005-2010. This also holds true within the black population, where a decrease in youth aged 10-19 is expected from 2005-2010. But for the immediate future, the black teen population will have a healthy increase of 6.2% from 2000-2005—good news for the hair styling products market.

Consolidation has taken place in the Black hair care industry, with several of the large, multinational manufacturers acquiring the small, ethnic hair care ones—for example, L'Oréal purchased Soft Sheen Products and Revlon purchased African Pride. This is due in part to the recognition that the Black consumer dollar is important and also the need for large companies to diversify.

Though black consumers represent a thriving ethnic marketplace in the United States, this and other segments are considered underdeveloped despite positive gains in demographic and spending trends. Industry reports estimate that ethnic hair care is allocated approximately a sixth of the shelf space that is given to general market hair care.

Overall, as blacks constitute a larger portion of the U.S. population, their buying power can be expected to grow as well, making them a significant factor in manufacturers' marketing and promotional plans.

MARKET FORECAST

Mintel has used the SPSS time series package to forecast the market to 2007. SPSS correlates historical market size data with key economic and demographic determinants (independent variables), identifying those factors having most influence on the market. Using forward projections of these factors, a market size forecast is produced.

Overview

Figure 43 shows Mintel's forecast of retail sales of all hair styling products.

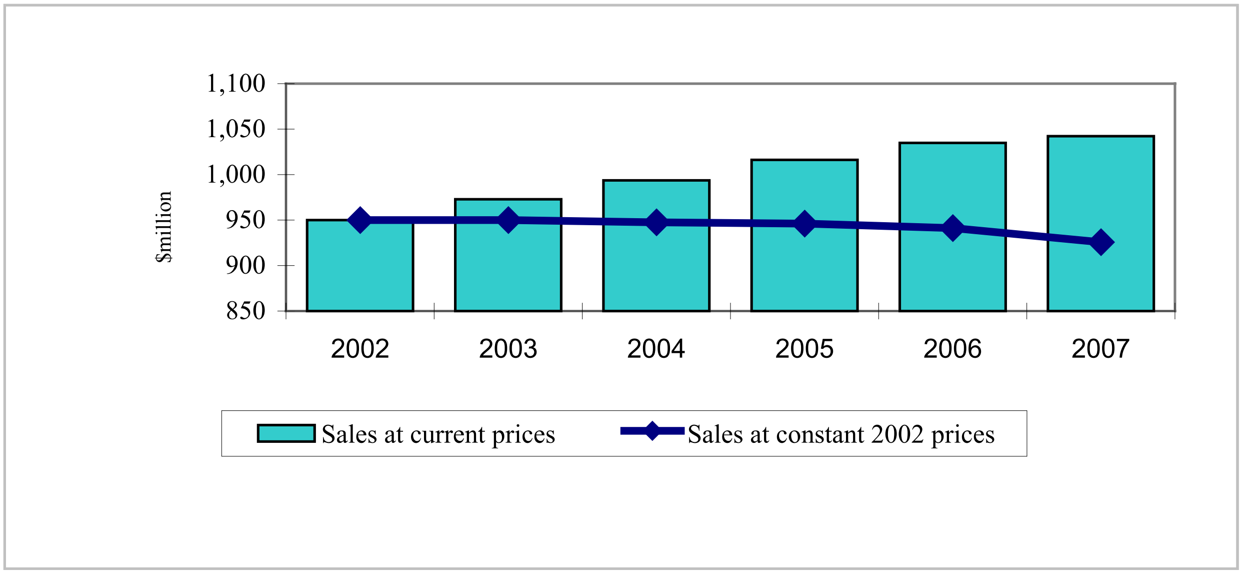
Figure 43 Forecast of U.S. retail sales of hair styling products, at current and constant prices, 2002-2007

Year	Sales at current prices			Sales at constant 2002 prices*		
	$million	Index	% change	$million	Index	% change
2002	949.9	100	-	949.9	100	-
2003	972.8	102	2.4	950.0	100	-
2004	993.6	105	2.1	947.6	100	-0.3
2005	1,016.1	107	2.3	946.3	100	-0.1
2006	1,035.0	109	1.9	941.3	99	-0.5
2007	1,042.4	110	0.7	925.8	97	-1.6

Source: Mintel

Forecasted sales are further illustrated in Graph 6.

Graph 6 ***Forecast of U.S. retail sales of hair styling products, at current and constant prices, 2002-2007***

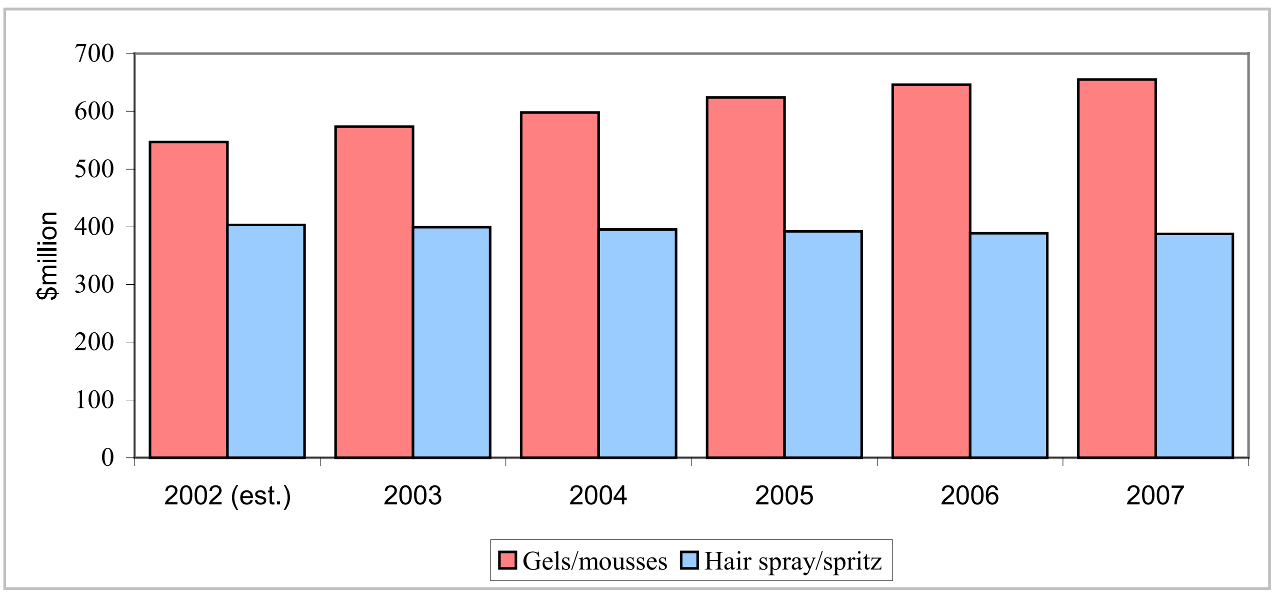


Source: Mintel

Total FDM sales of hair styling products are predicted to grow 10% at current prices and decline 3% at constant 2002 prices from 2002 to 2007. Women under age 35 do not want to spend a lot of time styling their hair, but they will try new products like detanglers and anti-frizz lotions that make styling easier and faster. Products that offer additional benefits like moisturizers or UV protection should do well. Continuing popularity of low maintenance hairstyles will result in diverging sales trends for the two segments, with hair gels and mousse growing and hair sprays and spritzes shrinking.

Graph 7 summarizes the projected sales for both of the hair styling segments explored further in the following subsections.

Graph 7 Forecast of U.S. retail sales of hair styling products, by segment, 2002-2007



Source: Mintel

Gels and mousses

Figure 44 shows Mintel's forecast of retail sales of gels and mousses.

Figure 44 Forecast of U.S. retail sales of gels & mousses, at current and constant prices, 2002-2007

Year	Sales at current prices			Sales at constant 2002 prices*		
	$million	Index	% change	$million	Index	% change
2002	546.9	100	-	546.9	100	-
2003	573.6	105	4.9	560.2	102	2.4
2004	597.9	109	4.2	570.2	104	1.8
2005	624.1	114	4.4	581.3	106	1.9
2006	646.2	118	3.5	587.7	107	1.1
2007	654.9	120	1.3	581.7	106	-1.0

Source: Mintel

Total FDM sales of hair gels and mousse are predicted to grow 20% at current prices and 6% at constant 2002 prices from 2002 to 2007. Growth will continue to be driven by new product development, allowing consumers to easily find products to suit their hair type and hairstyle. This is the area that is currently receiving the majority of research and development interest from manufacturers, with consumer interest clearly following. New development likely to drive this market is increasing take up by older consumers, as new products are targeted at them, and natural decline in the proportion of hair spray users as the older generations are replaced by those who have grown up using gel and mousse.

Hair spray and spritz

Figure 45 shows Mintel's forecast of retail sales of hair spray and spritz.

Figure 45 Forecast of U.S. retail sales of hair spray & spritz, at current and constant prices, 2002-2007

Year	Sales at current prices			Sales at constant 2002 prices*		
	$million	Index	% change	$million	Index	% change
2002	403.0	100	-	403.0	100	-
2003	399.2	99	-0.9	389.8	97	-3.3
2004	395.7	98	-0.9	377.3	94	-3.2
2005	391.9	97	-1.0	365.0	91	-3.3
2006	388.7	96	-0.8	353.6	88	-3.1
2007	387.5	96	-0.3	344.2	85	-2.7

* adjusted for inflation using All Items CPI

Source: Mintel

Total FDM sales of hair spray and spritz are predicted to decline 4% at current prices and 15% at constant 2002 prices through 2007. Sales will continue to fall as women choose simpler, more natural styles. Hair spray and spritz also face competition from new gels and mousses that give the same holding benefits but allow more natural hair movement. It appears that despite efforts to bolster this sector, sprays and spritz' continue to lose the battle of the styling products. It is feasible that new product development in this sector may boost sales, but the likelihood is for continued decline.

Forecast factors

The market forecast considers growth in the female population aged 15-49. The primary consumers in the market range from tween and teenage girls who are beginning to experiment with hair styling products to older women who have established styling regimens.

Future sales growth could be higher if:

- Manufacturers develop black hair care products for the mass market. The black population is growing faster than the total population and black women spend three times as much as non-black women on hair care products. The popularity of John Frieda's new Relax line, sold primarily in drug stores, should encourage major manufacturers to focus on product development in this area. Because many mainstream manufacturers now offer black hair care lines, manufacturers will then need to differentiate themselves based on performance.

- Changes in fashion make women turn away from straight styles and turn to styles with more volume. Some experts suggest that, and as quoted in the May 2002 issue of *HAPPI* magazine, the "big hair" of the 1980s will make a comeback and revive hair spray sales.

Future sales growth could be lower if:

- Private label products begin to capture a larger market share of gels and mousses. Only 18% of hair styling product users agreed that more expensive products work better than lower-priced ones. Private label currently accounts for less than 1% of the market, but there may be a potential market for lower-priced private label versions of popular styling products.

APPENDIX: TRADE ASSOCIATIONS

The following trade associations are associated with the hair styling products industry in the U.S.

The Cosmetic, Toiletry, and Fragrance Association (CTFA)
1101 17th Street NW
Suite 300
Washington D.C. 20036

Tel: 202.331.1770
Fax: 202.331.1969
Web: www.ctfa.org

CTFA was founding in 1894, and is currently the leading U.S. trade association for the personal care products industry. Some 600 members strong, its primary goal is to represent the personal care products industry's interests at the local, state, national, and international levels, promoting voluntary industry self-regulations and reasonable governmental regulation. CTFA has taken a leadership role in expanding the global marketplace for cosmetics by lobbying for consistent labeling and product-testing standards.

Independent Cosmetic Manufacturers and Distributors Inc. (ICMAD)
1220 West Northwest Highway
Palatine, IL 60067

Tel: 800.334.2623
Fax: 847.991.8161
Web: www.icmad.org

ICMAD is a trade association of more than 700 entrepreneurial companies representing virtually all segments of the cosmetic and beauty industry. Their primary goal is to protect, educate, and represent entrepreneurs and independent companies. They provide a unified front for these companies when dealing with the FDA, Congress, state legislatures, the media, and consumer groups.

Society of Cosmetic Chemists (SCC)
120 Wall Street
Suite 2400
New York, NY 10005-4088

Tel: 212.668.1500
Fax: 212.668.1504
Web: www.scconline.org

The SCC was founded in 1945 to "promote high standards of practice in the cosmetic sciences," according to the organization's website. The SCC provides scientific information, as well as "forums for the exchange of ideas and new developments in cosmetic research and technology" for its more than 3,600 members.

American Health and Beauty Aids Institute (AHBAI)
401 North Michigan Avenue
Chicago, IL 60611

Tel: 312.644.6610
Fax: 312.321.5194
Email: ahbai@sba.com

Founded in 1981, AHBAI represents African-American health and beauty manufacturers, providing its members' products with an internationally recognized symbol to show their status as high quality products.

APPENDIX: NEW PRODUCT DEVELOPMENTS

The New Product Developments section of this report is provided by GNPD, a division of Mintel specializing in new product monitoring. Trends and products mentioned here indicate new product activity and may not be indicative of broader market trends.

For more information on GNPD contact Mintel at 312.932.0400.

NEW PRODUCT TRENDS

Introduction

Long gone are the days when the only hair styling products available to consumers were stiffening hair sprays and setting lotions. Styling aids are now more sophisticated and include mousses, waxes, pomades, gums, molding clays and gels. Even some of these are becoming outdated: mousses, for example, are under-performing in most markets compared to the other available options. Of late, new product development has mainly focused on creating new textures and formulations, with better styling (and caring) performance to cater to changing fashion trends.

This section examines global new product developments and trends in the hair styling market. Topics covered include the following:

- Making a fashion statement—the market is led by fashion, and new products to create a mussed, straight or curly style
- Style and protect—consumer demand is not solely linked to style; they also expect products to care for their hair
- Color caring styling developments—the popularity of hair colorants has undoubtedly had its effect on styling products
- Launches for men only
- Hair spray bites back—the fall from favor of hair sprays has encouraged more advanced new product development
- Packaging.

New Product Numbers

Figure 46 outlines the number of new hair care product introductions in the U.S. from 2000-2002.

Figure 46 Number of hair care product introductions, by type, 2000-2002

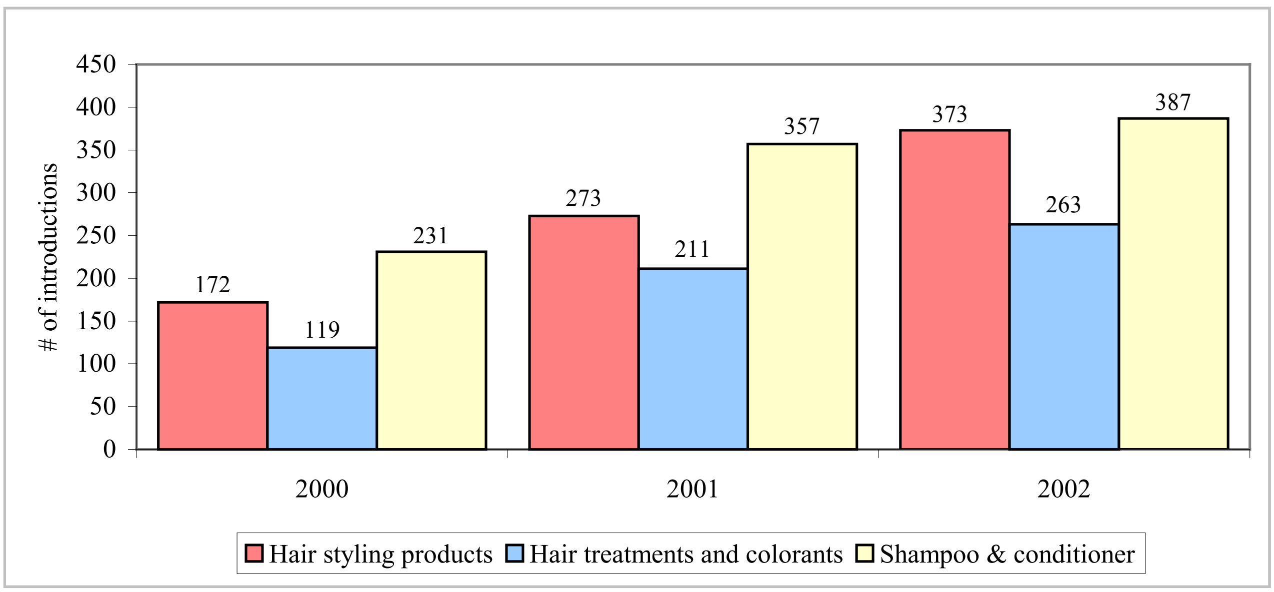
	Number of introductions			Change
	2000	**2001**	**2002***	**2000-2002 %**
Hair styling products	172	273	373	116.9
Hair treatments and colorants	119	211	263	121.0
Shampoo & conditioner	231	357	387	67.5
Total	**522**	**841**	**1,023**	**96.0**

* January-October
Note: numbers include new brands and line extensions, but do not include packaging changes and products flagged new and improved

Source: Global New Products Database

Graph 8 further depicts the number of new product launches.

Graph 8 Number of new hair care launches, 2000-2002



Note: 2002 data are for January-October

Source: Global New Products Database

Most activity for hair styling products has been balanced between new products and new varieties, with the exception of 2000. During this period there were a great deal of completely new product launches, most notably P&G's Physique line in FDM stores, but the market is expected to balance itself out in 2002 as range extensions take the place of completely new product lines.

Product Trends

Making a fashion statement

Hair styling products are no longer just used to set a hairstyle into place—in many cases they actually create the look. Not surprisingly, the market is led by fashion, and styles range from the more conservative to the wild. Current popular looks fall into three general categories: the straight effect, the messed up look, and the curly statement.

For encouraging hair to go straight, new products have been introduced in a number of formats, including alcohol-free gel, mousse and cremes. They mostly claim to moisturize hair and smooth away frizz and curl. Some recent introductions include the following:

- Alberto-Culver's VO5 branded Straight Hair product that straightens, smoothes and shines (U.S.)
- A Lux branded Sarasara Straight Foam from Lever, said to moisturize and straighten hair (Japan)
- Procter & Gamble's Smoothing Collection additions, including Get It Straight Gel and Stay Smooth Settique Spray (U.S.).

For some followers of fashion, it seems the messier the hairstyle, the better. But the unstructured look is not as easy to achieve as one might think, and there are many styling products on the market to help. The most notable recent launch has been the Out of Bed range of creams, gels and waxes from L'Oréal, under its Studio Line banner. The range has been launched around the world, and is said to recreate a lasting messed up effect.

Other similar products include:

- Schwarzkopf & Henkel's Osis + Mess Up Matt Gum (Australia)
- Hair Make Up Twist It Modelling Paste from Jean-Marc Maniatis (France).

Perhaps the most developed area of hair styling, controlling curls and frizz is also easier now. The main purpose of such products is to create shiny, defined curls without the frizz, bushiness and dryness normally associated with curly hair. There has been much research and development in this area, with many advanced curl control formulations. Launches include Procter & Gambles' Pantene Pro-V Curls Collection range, which includes the January 2001 addition of Curl Defining Mousse.

The trends toward glitter and shimmery accents that have appeared in makeup, skin care and body lotion are also appearing in hair styling products, with many glittering gels and hair sprays (especially in the U.S.), and bold glowing colors (again in the U.S.). Some of the more unusual lines are as follows:

- Hard Candy's Techno Glitter Hair spray (U.S.)
- A hair gel from Advanced Research Laboratories, under the Got 2b Me brand, that glows green under a black light (U.S.)

- Bumble & bumble Sumo Wax, inspired by the hair wax used by sumo wrestlers (U.S.).

Style and protect

As in other hair care subcategories, a growing trend has been consumer demand for more treatment claims from their hair care products. More is expected from a styling aid: consumers are looking for products that not only create a style but are also gentle and nourishing to hair. Products are being introduced with more advanced formulations, enriched with vitamins, herb extracts and "pure" water-based lines. The science behind product ingredients is being explained to consumers. Some examples include:

- Thermo Actif Mousse from Jacques Dessange, which is enriched with vitamins and is "superactivated" by the hairdryer (France)
- Suiban Tappuri Hair Water from Kao, formulated with moisturizing ingredients and birch extract to protect hair from blow-drying heat damage (Japan)
- Shine & Control Balm from The Haircare Studio formulated with henna extract, sunscreen and moisturizing molecules (New Zealand)
- Dream Hair from designer Charles Worthington formulated with sun protecting ingredients, antioxidants, vitamins and natural moisturizers (Australia).

Color care styling developments

If the number of new products introduced is any indication, the hair colorants market has performed well over the last couple of years, and this success has impacted the other hair subcategories. Just as in shampoos, there has been development of color protecting/maintaining lines—the same trend is appearing in the styling market. New color enhancing styling aids include:

- Bumble and bumble Colour Support styling lotions, available in supporting formulas, such as Cool Blondes, True Reds and Warm Brunettes (U.S.)
- Pantene Pro V Color Care Styling products from Procter & Gamble including Radiant Response Gel with Colorshine and Radiant Response Mousse with Colorshine (U.S.)
- Cheveaux Colorés from L'Oréal (under the Elnett Satin brand) is a hair spray particularly suitable for colored hair and formulated with UV filters (France).

Launches for men only

Traditionally hair styling products have been geared either towards young women or have been unisex in nature. The exception was Brylcreem, which for a time was the only styling option available to men. As manufacturers realized the degree to which men are a viable target market for a wider variety of products, many have introduced gels, waxes and creams to meet their styling needs. Some recent men's products include:

- Brylcreem for men with ingredients typically found in skincare and food formulations such as ginseng and aloe vera (Malaysia)
- Elida Fabergé extended its Lynx men's toiletries brand into styling products, as well as shampoos and conditioners (UK)
- Davidoff Cool Water men's fragrance was extended by Lancaster with a Cool Hair Gel for men (U.S.)
- Circ, the new discreet range of hair thickening products from Procter & Gamble, also included a Styling & Cooling Gel (UK).

Hair spray bites back

Old-fashioned hair sprays have largely fallen out of favor over the years. Styles have softened and become more natural, and there has been much competition from newer more modern formats. But hair spray remains popular with the older generation, and new product development has taken place to give it a softer and sleeker positioning. Some recent more modern hair sprays include:

- Hair Shine from Prescriptives, which polishes hair to create a sleek finish (U.S.)
- Laque Brillance from Jean Francois Lazartigue, said to protect hair, prevent frizz and add shine (France)
- Fast Forward Quick Dry hair spray from L'Oréal under the Studio Line brand, said to dry in seconds and give long lasting movable style support (U.S.).

Packaging

Traditionally, gels have been packaged in plastic tubes, mousses and hair sprays in metal cans, and waxes in plastic pots. More recently, however, the market has seen the emergence of plastic spray bottles and pump dispensers for the likes of waxes and gel/water formulations, and refill pouches (particularly in Japan).

As in many categories, convenience seems to push packaging developments. Consumers want to dispense and apply their styling aids quickly, which is why the spray formats have performed so well. To this end, newer, more convenient roll-on, stick formats and travel sizes have appeared. New launches include the following products:

- Waxtick from Ultra Magic, which is a convenient pocket-size stick of hair wax which can be applied directly to the hair with one hand (Japan)
- Roll & Fix hair gel from Le Club des Créatures de Beauté which allows application without getting the product on the hands
- Physique Styling Stick from Procter & Gamble, packaged in a twist-up plastic tube (U.S.)
- Aquawork, a hair straightening range from Utena, packaged in large pistol-grip spray bottles, and plastic refill pouches (Japan)
- A hair gel launched under the Ctrl@L'anza brand, packaged in fun computer mouse style cases (Germany).

Forecast/Predictions

In closing, the market is looking particularly good for the likes of gels and waxes, and not so good for more traditional products such as hair sprays, and to a lesser extent mousses. New product innovation is attempting to improve the fortunes of hair sprays, and new formats and textures are becoming more in demand. Based on recent new product launches, GNPD forecasts the following trends:

- New formats/textures: a continued blurring between the current styling formats to add a touch of variety; more 2-in-1 gel and wax formulations, foaming waxes, liquids that turn into mousses; and water-based lines with a "pure" positioning
- Convenience: currently consumers expect a fixed style with a natural feel, so more could be done in terms of preventing residue deposits, or a sticky feel. Consumers also expect their styles to last longer
- Organic: the sector is very small for styling products, but could see future development if consumers continue to demand natural products
- Packaging formats: consumers want practical, easy-to-use dispensers, that do not take up a lot of space either on dressing tables or in handbags; expect to see continued development for the spray, stick and roll-on formats.

NEW PRODUCT BRIEFS

The following new product briefs are taken directly from the GNPD database of new products. These are provided as an indication of new product activity and may not represent major changes in the overall market.

For more information on GNPD contact Mintel at 312.932.0400.

Matrix Essentials: Matrix Glow Trix Luminous Crème Smoother

Company:	Matrix Essentials
Item ID:	10121330
Brand:	Matrix Glow Trix
Product:	Luminous Creme Smoother
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Product
Issue:	22-2002 (19 Nov)
Packaging:	Plastic bottle
Distribution Type:	Specialist Retailer
New Product Count:	1

Product Description

The company introduces Matrix Glow Trix Luminous Creme Smoother. This product, available in salons, retails in a plastic pump bottle.

Positioning Claims

Premium

Kids Care: Jungle Care Really Straight Hair Straightener

Company:	Kids Care
Item ID:	10122159
Brand:	Jungle Care
Product:	Really Straight Hair Straightener
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Product
Issue:	22-2002 (19 Nov)
Price in US Dollars:	$4.99
Packaging:	Plastic tube
Distribution Type:	Mass merchandise
New Product Count:	1

Product Description

The company introduces its Jungle Care Pre-Teen Really Straight Hair Straightener for the first time ever in mass distribution. A free-standing plastic tube retails for $4.99 in mass merchandise stores.

Positioning Claims

Children (5-12)

Sephora: Sephora Glitter Spray

Company:	Sephora
Item ID:	10120702
Brand:	Sephora
Product:	Glitter Spray
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Variety/Range Extension
Issue:	21-2002 (05 Nov)
Price in US Dollars:	$10.00
Pack Size:	oz
Packaging:	Bottle
Distribution Type:	Internet/Mail Order, Specialist Retailer
Distribution:	National
New Product Count:	1

Product Description

The company introduces Glitter Spray for hair. Available in Gold and Silver varieties, the product can be found in Sephora stores and on the Internet for $10.

Positioning Claims

Premium

Rusk: Rusk’s Being Slick Pomade

Company:	Rusk
Item ID:	10120475
Brand:	Rusk's Being Slick
Product:	Pomade
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Product
Issue:	21-2002 (05 Nov)
Price in US Dollars:	$5.95
Pack Size:	1.80oz
Packaging:	Jar
Distribution Type:	Specialist Retailer
New Product Count:	1

Product Description

The company claims that it's "time to let loose!" The company introduces Pomade, a hair ointment used to style even the most unruly hair. According to the company, the product instantly creates bold, healthy, vibrant looks with gravity-defying body and movement. It retails for $5.95 in Rusk stores.

Ingredients

Water, oleth-10, oleth-20, PVP/VA copolymer, glycerin, PEG-60 hydrogenated castor oil, tridecyl stearate, neopentyl, glycol dicaprylate/dicaprate, fragrance, panthenol, phenyl trimethicone, panthenyl hydroxypropyl steardimonium chloride, hydrolyzed rice protein, arctium lappa root extract, ivy extract, trigonella foenum-graecum seed extract, PPG-10 butanediol, tridecyl timellitate, propylene glycol, DMDM hydantoin, methylparaben, propylparaben

Philip Pelusi: Philip Pelusi Roots Texture Groom for Men

Company:	Philip Pelusi
Item ID:	10119762
Brand:	Philip Pelusi Roots
Product:	Texture Groom for Men
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Variety/Range Extension
Issue:	20-2002 (22 Oct)
Pack Size:	10.00oz
Distribution Type:	Specialist Retailer
Distribution:	National
New Product Count:	1

Product Description

Roots Texture Groom for Men is designed to separate and define without making hair stiff or sticky, states the company. In addition, it delivers shine and protects hair from the sun's damaging UVA and UVB rays. A 10-oz. size is sold for $21.95 in private salons nationwide.

Ingredients

Formula 74-0080-extract of geranium (*geranium maculatum root) (and) oatmeal (*avena sativa seed) in deionized water, emulfifying wax USP (*fatty alcohol), cetyl alcohol USP (*cocus nucifera kernel), glyceryl stearate (and) stearamidoethyl diethylamine (*cocus nucliera kernel), glyceryl stearate (*cocus nucifera kernel), DMDM hydantoin (*organic glycolyurea), cetylpyridinium chloride USP, (*silics), pantheno USP (*vitamin pantothenic acid analog), benzophenone-4 (*flower pigments), saccharomyces/calcium ferment (*live, yeast cells), benxethonium chloride USP (*organic quaternary), biotin USP (*saccharomyces cerevisiae yeast)

Positioning Claims

Functional
Male
Premium

Graham Webb: Nolita Straightening Spray

Company:	Graham Webb
Item ID:	10115261
Brand:	Nolita
Product:	Straightening Spray
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Variety/Range Extension
Issue:	16-2002 (20 Aug)
Pack Size:	8.00floz
Packaging:	Plastic bottle
Bar Code:	0793413910706
Distribution Type:	Specialist Retailer
New Product Count:	1

Product Description

The company introduces Nolita Straightening Spray, described as chic, sleek, smooth, and sophisticated. An 8-fl. oz. plastic bottle with pump is sold in salons.

Ingredients

Butylene glycol, water, dimethicone copolyol, cyclopentasiloxane, cyclomethicone, PVP/VA copolymer, amodimethicone, PEG-40 hydrogenated castor oil, dimethiconol, dimethicone, tetrasodium EDTA, phenoxyethanol, methylparaben, butylparaben, ethylparaben, isobutylparaben, propylparaben, fragrance

Curl Friends: Gooey Goo Sculpting Wax for Curly Hair

Company:	Curl Friends
Item ID:	10113104
Brand:	Gooey Goo
Product:	Sculpting Wax for Curly Hair
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Product
Issue:	14-2002 (23 Jul)
Price in US Dollars:	$14.00
Pack Size:	2.00oz
Packaging:	Plastic jar
Bar Code:	835044001092
Distribution Type:	Specialist Retailer
New Product Count:	1

Product Description

The company introduces Gooey Goo Sculpting Wax for Curly Hair. It will be sold for $14 in salons in New York City, Los Angeles, and South Florida starting in August 2002.

Ingredients

Water, proplyene glycol, petrolatum, oleth-20, oleth-3, oleth-5, mineral oil, PVP/VA copolymer, ozokerite wax, DEA-oleth-3 phosphate, DEA oleth-10 phosphate, fragrance, PEG-150 pentaerythrityl tetra-stearate PEG-6 caprylic/capric PEG-45, methylparaben, propylparaben, diazolidinyl urea

Positioning Claims

Premium

PureOlogy: PureOlogy Serious Colour Care Texture Twist Styling Reshaper

Company:	PureOlogy
Item ID:	10108627
Brand:	PureOlogy Serious Colour Care
Product:	TextureTwist Styling Reshaper
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Product
Issue:	10-2002 (21 May)
Pack Size:	3.00oz
Packaging:	Plastic tube
Distribution Type:	Specialist Retailer
Distribution:	National
New Product Count:	1

Product Description

The company introduces TextureTwist Styling Reshaper. It is sold in a 3-oz. plastic tube in salons nationwide.

Procter & Gamble: Herbal Essences Natural Volume Weightless Hair Spray

Parent Company:	Procter & Gamble
Company:	Clairol
Item ID:	10107113
Brand:	Clairol Herbal Essences Natural Volume
Product:	Weightless Hairspray
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Variety/Range Extension
Issue:	09-2002 (07 May)
Price in US Dollars:	$2.99
Pack Size:	7.00oz
Packaging:	Metal bottle
Bar Code:	381512055000
Distribution Type:	Supermarket
Distribution:	National
New Product Count:	1

Product Description

The company introduces Weightless Hairspray to its Herbal Essences Natural Volume line. Formulated with chrysanthemum, violet, and mallow, it is sold in a 7-oz. metal bottle for $2.99 in supermarkets nationwide.

Ingredients

Water, dimethyl ether, alcohol denat, diglycol/CHDM/isophthalates/SIP copolymer, octylacrylamide/acrylates/butylaminoethyl methacrylate copolymer, malva sylvestris (mallow) extract, chrysanthemum coccineum flower extract, viola odorata extract, hydrolyzed wheat protein, hydrolyzed wheat protein/PVP crosspolymer, hydrolyzed wheat starch, acetamide MEA, hydrolyzed soy protein, fragrance, aminomethyl propanol, dimethicone copolyol, glycereth-7 triacetate, propylene glycol, polysorbate 20

Helene Curtis (Unilever): Thermasilk Hear Activated Shine & Shape Gel

Company:	Helene Curtis
Item ID:	10107125
Brand:	Thermasilk
Product:	Heat Activated Shine & Shape Gel
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Variety/Range Extension
Issue:	09-2002 (07 May)
Price in US Dollars:	$3.99
Pack Size:	8.00oz
Packaging:	Plastic bottle
Bar Code:	079400076403
Distribution Type:	Supermarket
Distribution:	National
New Product Count:	1

Product Description

The company introduces Thermasilk Heat Activated Shine & Shape Gel. It offers light hold and retails in an 8-oz. plastic pump bottle for $3.99 in supermarkets nationwide.

Ingredients

Water, silk protein, silk amino acids, phytonitriol, arginine, oleth-20, hydroxyethylcellulose, triethanolamine, carbomer, fragrance, propylene glycol, isoceteth-20, diazolidinyl urea, tetrasodium EDTA, methylparaben, mica, propylparaben, titanium dioxide (CI 77891)

Schwarzkopf-Dep: Dep10 Sport 2-In-1 Anti-Dandruff & Styling Gel

Company:	Schwarzkopf-Dep
Item ID:	10107482
Brand:	Dep10 Sport
Product:	2-In-1 Anti-Dandruff & Styling Gel
Category:	Haircare
Sub-Category:	Hair Styling Products
Country:	USA
Launch Type:	New Variety/Range Extension
Issue:	09-2002 (07 May)
Price in US Dollars:	$2.79
Pack Size:	8.00oz
Packaging:	Plastic tube
Bar Code:	0041670261308
Distribution Type:	Drug store
New Product Count:	1

Product Description

The company introduces Dep10 Sport 2-In-1 Anti-Dandruff & Styling Gel, which is claimed to provide "ultimate Xtreme hold." The product retails in an 8-oz. plastic tube for $2.79 in drug stores.

Ingredients

Active ingredient: zinc pyrithione 0.1%; inactive ingredients: water, PVP, sorbitol, hydroxypropylcellulose, acrylates/vinyl isodecanoate crosspolymer, methacryloyl ethyl betaine/acrylates copolymer, fragrance, oleth-20, aminomethyl propanol, potassium sorbate, tetrasodium EDTA, diazolidinyl urea, methylchlroisothiazolinone, methylisothiazolinone, D&C green #5, ext. D&C violet #2

APPENDIX: RESEARCH METHODOLOGY

Mint*e*l International Group, Ltd is an independent market analysis company. Mint*e*l prides itself on supplying objective information on a whole range of markets and marketing issues.

Mint*e*l was founded in 1976 and has a long-established reputation as a leading publisher of "off-the-shelf" market information. Mint*e*l has achieved "Superbrand" status in the UK, and is widely and regularly quoted in both national and specialist press.

There are three main sources of information and research stages used in the compilation of Mint*e*l reports:

- Exclusive consumer research is commissioned by Mint*e*l for individual reports, and non-exclusive large-scale surveys are also drawn upon extensively
- Trade interviews, both formal and informal, are conducted with relevant industry players
- Mint*e*l's exclusive market size and economic databases are utilized; these have been developed by our team of statisticians and based on government and business data.

Reports are written and managed by analysts who are specialists in specific markets, or in their own fields.

CONSUMER RESEARCH

Mint*e*l commissions exclusive and original quantitative consumer research—especially for the reports. Mint*e*l invests a considerable sum each year in consumer research. The Mint*e*l report purchaser benefits as the price of an individual report is less than the cost of the original research alone. The research brings an up-to-date and unique insight into important topical issues.

Consumer research is conducted amongst a nationally representative sample of adults. Surveys are conducted by specialist survey research firms and typically include:

ICR Surveys:	Telephone omnibus survey (EXCEL)

Results of these surveys are only available in Mint*e*l reports.

In addition and as appropriate, Mint*e*l reports draw on:

Simmons Research	National Consumer Survey surveys using each of the three surveys covering "Households," "Teens," and "Kids."

Sampling & Weighting

ICR Surveys EXCEL

EXCEL is a national, twice-weekly, consumer telephone omnibus service.

With the assistance of Computer-Assisted Telephone Interviewing (CATI), interviewers contact, screen, and interview a nationally representative sample of adults, using a questionnaire prepared by Mintel.

In each EXCEL survey, at least 1,000 telephone interviews are conducted with males and females, 18 years of age or older living in telephone households located in the continental U.S. These interviews are quota-sampled so that one half of the respondents are males and one half are females. The sample for each EXCEL is a computer-generated, fully replicated, stratified, single-stage random-digit dialing (RDD) sample of telephone households.

Within each sample household, one adult respondent is randomly selected using a computerized procedure based on the Most Recent Birthday Method of respondent selection (i.e., May I please speak to the Male/Female, 18 years of age or older, living in this household who had the most recent birthday?). Interviewing for each EXCEL survey is conducted over a five-day period encompassing both weekdays and weekends.

Each EXCEL survey is weighted to provide nationally representative and projectable estimates of the adult population. The weighting process takes into account the disproportionate probabilities of household selection due to the number of separate telephone lines and the probability associated with the random selection of an individual household member. Following the application of weights, the sample is post-stratified and balanced by key demographics such as age, sex, region and education.

If you would like more information on the sample weighting procedure used for the EXCEL survey please contact Mintel.

Simmons National Consumer Surveys "Households," "Teens" & "Kids"

Mintel reports frequently draw on the Simmons National Consumer Surveys, and may include data from its surveys of "Households," "Teens," "Kids," & "Hispanics"

The Simmons National Consumer Study (NCS) is a comprehensive survey of adult (18+ years of age) American consumers. It provides single-source measurement of major media, products, services, and in-depth consumer demographic and lifestyle/psychographic characteristics.

- 20,000 Adults 18+
- Single-phase data collection – media, product and consumer behavior data collected through a self-administered survey booklet
- Survey placed in the home via phone contact
- Upfront incentive/sweepstakes offer
- All household members participate by completing their own personal booklets
- Principal shopper completes one Household Survey
- Conducted twice each year – Spring & Fall
- Released twice each year – Spring & Fall reports
- Ability to look at full-year and six-month data

The samples for the Kids and Teens Studies are taken from the same households participating in the adult study. The Kids and Teens Studies provide in-depth insight into these consumer segments to understand their affect on the marketplace, and how and where to reach them.

- 2,500 Teens 12-17 and 2,600 Kids 6-11
- Both samples gathered from within NCS participating households
- Upfront incentive/sweepstakes offer
- All teens or kids in household participate by completing their own personal booklets
- Conducted twice each year – Spring & Fall
- Released twice each year – Spring & Fall reports

The Simmons National Hispanic Study is the only national, multi-media syndicated research instrument targeting the Hispanic market, and is particularly valuable in identifying media habits, product and service usage and attitudes and opinions among this segment.

- 10,000 Hispanic Adults 18+
- Single-phase data collection – media, product and consumer behavior data collected through a self-administered survey booklet
- Survey offered in Spanish or English – respondent's choice
- Incentive/sweepstakes offer
- One person per household participates
- Conducted annually Released annually

Presentation & Definition

Unless otherwise stated, consumer research data are presented as penetration, i.e. as a percentage of demographic sub-groups such as age, e.g. 71% of 18-24 year old are suncream users. Profiles are represented as proportions of the population, e.g. 8% of suncream users are aged 18-24.

Some reports contain qualitative research, either focus groups or in-depth interviews, and a full explanation of the methodology used in these areas is given in the individual Introduction section of such reports.

Definitions of the main consumer classification systems used in the report are shown at the end of this section.

Further Analysis

Consumer research is stored in a database supervised by Mintel's data analysts and statisticians. For additional analysis of survey data, please call Joan Heaney or Bill Patterson at 312.932.0400.

TRADE RESEARCH

Informal trade research

Is undertaken for all reports. This involves contacting relevant players in the trade, not only to gain information concerning their own operations, but also to address various brand and marketing issues in the market under review. To ensure the accuracy of its reports, Mint*e*l will send draft copies of reports to key industry representatives, and take account of their feedback. Comments, where appropriate, are incorporated into the report prior to final publication.

Formal trade research

Using experienced external researchers, in-depth trade interviews are carried out as appropriate for some reports. This takes the form of full trade interview questionnaires and direct quotations are included in the report. This gives valuable insight into a range of trade views on topical issues.

DESK & INTERNET RESEARCH

Mint*e*l holds a variety of publications, including government statistics, consumer and trade association statistics, manufacturer-sponsored reports, annual reports, directories and articles from over 200 publications, from both the U.S. and abroad. All information is cross-referenced for easy access.

Data from other published sources are the latest available at the time of writing the report.

All analysts and writers have access to Mint*e*l's market size and economic factors database. This is a database containing all areas of consumer expenditure and macroeconomic and demographic factors which affect consumer spending. This database is used in conjunction with an SPSS forecasting package to produce a market size forecast.

Mint*e*l subscribes to a number of online databases which are made available to our analysts.

SOURCES

Where data are provided by a particular source, the source is indicated below the Figure (Table). Often figures are sourced "Mintel". This means that information is derived from a variety of sources, with the writer filling in any information gaps or interpreting data, to give an accurate representation of the market. In this way, it can be ensured that data are consistent both with other data in the report and the wider array of Mintel data.

Data that are estimated are referenced as such either because the original source data are only at the estimated stage and are not finalized or because they have been estimated by Mintel analysts.

DEFINITIONS

Most demographic definitions in the reports are self-explanatory; please contact Joan Heaney or Bill Patterson at 312.932.0400 if you have further questions.

FORECASTS

Market forecasts are created by Mintel's in-house statisticians using the SPSS and/or SMARTFORECASTING software packages.

The statisticians correlate historic market size data with key economic and demographic variables, identifying those factors having most influence on the market. Using forward projections of these factors, a market size forecast is produced.

Mintel has compiled its own database of key economic and demographic variables from government and independent sources. The database includes both historical and projected data and are used in combination with Mintel's own market size and segmentation database.

APPENDIX: WHAT IS MINT*e*L?

MINT*e*L PUBLICATIONS

In the UK, Mint*e*l publishes over 25 reports each month, covering a wide range of sectors and focusing on topical marketing issues. The 'Intelligence' reports are published in five series—Market, Leisure, Retail, Finance and Special Reports—as well as the Irish Series, Industrial, EuroViews and the Internet series.

In the U.S., Mint*e*l publishes its *consumer intelligence* series of reports. *consumer intelligence* covers 13 sectors: Food Service, Food, Drink, Pursuits/Hobbies, Travel, Clothing/Fashion, Health/Medical, Beauty/Personal, Household, Services, Publishing, Automotive and e-commerce.

Mint*e*l publications provide analysis of market sizes and trends, market segmentation, and consumer attitudes and purchasing habits, as well as assessing the future of the market.

By providing a comprehensive picture of the consumer, Mint*e*l's reports provide thorough analyses of market sectors, breaking down often complex issues into easy-to-understand sections that detail marketing opportunities and weaknesses.

What does the future hold for my business? What do my consumers want? What strategies are my competitors employing? What is likely to happen over the next few years?

The future of your marketing depends on answering these questions—something Mint*e*l prides itself on.

The key to being well equipped for the future is a better understanding of the present. So whatever your question, Mint*e*l will have the answer.

Mint*e*l also publishes an Index, updated every month, which is a comprehensive guide to all reports published by Mint*e*l publications from 1998 to date. If you would like details of an earlier report or further details regarding any of the reports mentioned in the Index, please contact the Mint*e*l information team in Chicago at 312.932.0400 or in London at +11 44 (0)20 7606 4533 or email info@mint*e*l.com.

MINT*e*L SERVIC*e*S

Operating for more than 25 years, Mint*e*l Servic*e*s has unrivaled, independent experience in the fast-moving product intelligence market. Our in-house team researches trends in consumer packaged goods (cpg) sectors and offers specialist in-depth analyses and services.

No other information service provider can put you in touch with global consumer markets by sourcing new or established products, putting them in your hands, monitoring your competitors in stores in over 130 countries, performing quality analyses, and providing a breadth and depth of published data which are simply unrivaled.

Mint*e*l Servic*e*s can provide a customized service, with tactical delivery of information according to your requirements, or offer you a comprehensive range of products and publications.

Product retrieval

You've seen or heard of a product existing in Australia that has given you an idea…but first you want to get your hands on the real thing. One phone call to Mint*e*l Services and we will have one of our field associates retrieve the product, from the country you specify, within 24 hours. As soon as possible, the product will be on your desk. The product retrieval service allows you to perform quality assurance tests, generate new product ideas, undertake consumer product sampling, procure products for tasting panels, identify gaps in the market, perform competitor evaluations, and evaluate new export markets.

Retail audits

You can receive regular details and updates about your competitors' single items, whole product ranges, or from particular outlets, delivered straight to your door, as often as you wish. Data can also be collected simultaneously in any number of countries to give you instant worldwide snapshots of particular consumer markets. Many of our researchers use electronic messaging services to deliver the data to you, via Mint*e*l Servic*e*s, within hours of being collected.

Within hours of your request, we can have one of our worldwide contacts out in a store, surveying the state of your and your competitors' products. For each product or brand, any or all of the following information can be collected, pricing surveys, comprehensive shelf surveys, trade-age surveys, and pack appearance monitoring.

Tailored research

You simply brief our worldwide network of field associates as to which sectors you are interested in, and they will constantly monitor the retail shelves and trade literature in their region for the new products. The information will then be compiled and sent to you—putting your finger on the pulse, yet keeping your hands free.

If you require something more specific, just tell us what you want and our network of researchers can be your eyes and ears. You will have a global army of information gatherers working for you. Whether it's a particular variety of coffee bean found in Papua New Guinea or spices in India, the network will be on the lookout for your requirements.

Choose from any combination of our core services and tailor them to suit your own individual company needs, budget and preferences.

You can make two kinds of decision. One is informed, the other is not. Track it. Trial it. Try it, with Mintel Services.

For details on how to set up an account with Mintel Services, or to discuss your latest project, telephone Paul Phillips at 312.932.0400 or email pphillips@mintel.com.

Global New Products Database

The world's premier editorial coverage of new product development, the **gnpd** is a comprehensive database that monitors worldwide product innovation in consumer packaged goods markets, offering unrivaled coverage of new product activity for competitor monitoring and product idea generation.

The **gnpd** covers:

- food, beverage and nonfood sectors
- 31 categories and 101 subcategories
- all key global markets.

The **gnpd** features:

- pictures, ingredients, product details and descriptions of all key new products
- fully searchable fields
- ability to save search criteria
- front page that can be customized to user preferences
- extract facility to create customized reports and presentations
- daily updates
- email alert service to deliver the latest news straight to your desktop
- dedicated customer service
- free consultancy advisory service from our highly experienced editorial teams in London and Chicago
- full IT training from the **gnpd** helpdesk.

Whether you want to monitor how your market is evolving or require instant information on a specific product, you'll find it all at your fingertips with **gnpd**.

*compere***media**

*compere***media**® is the premier competitive database for direct mail and print advertising market research in the United States and Canada. It is a self standing subsidiary of Mint*e*l International Group Ltd

Direct Mail-U.S. and Canadian Consumers
Our direct mail tool allows you to track acquisition and customer mail in the U.S. and Canada. Each record contains detailed information about the offer, the incentive, pricing-everything marketers want to know about competitive offers and products, plus the images of each creative. A demographic profile displays the age, income, and region of the panelists who received each mailing.

In the U.S. each month, 8,000 households from a pool of 250,000, are invited to participate in the study. In Canada each month, 2,500 households from a pool of 40,000, are invited to participate in the study.

Direct Mail-Business-To-Business
Our business-to-business panel is made up of 1800 panelists who either work for or own businesses of varying sizes and from different industries (excluding governmental and non-profit), as well as have locations across all fifty states. Sizes range from small businesses with 1-4 employees with gross volumes of less than $100,000 to large businesses with 10,000+ employees with sales over one billion dollars.

Print Advertising
Our coverage of print advertising includes national newspapers and the top 50 DMAs across the country, as well as nearly 50 consumer and business magazines. The newspaper coverage for national newspapers and the top 10 DMAs are posted within 48 hours of publication, giving you the opportunity to develop a quick competitive response.

Plan-It
Especially relevant for advertisers, plan-it is the ideal tool for media planning and competitive analysis. plan-it is simple to use, flexible, and displays only the data you need. plan-it allows you to create competitor media schedules, view ratecard spend for your competitors and develop presentation-ready graphs. Media planners can use plan-it to analyze previous campaigns, to refine their own schedules, and improve their overall advertising.

Research Capabilities
Effective research starts with a thorough appreciation of the needs of you, the client. We will work with you on a needs assessment and determine the most pressing issues facing your industry and company. At *compere***media**, we work with you to find solutions to meet your needs and make you more successful in developing offers, products, and marketing strategies.

RESEARCH SUPPORT/CONSULTANCY/MIC

- Mintel's in-house market analysts are on hand to assist subscribers with any further questions on published reports.
- MiC—the Mintel Information Center—provides an excellent complementary service for additional customized information requests.

The Mintel Information Centre (MiC)

- Analyzing any figure, any market, any country
- MiC is the information center of Mintel, undertaking customized research which range from a simple question to the commissioning of exclusive and in-depth market research studies.
- Saving you not only time and money, but also energy
- Answers can be on your desktop in a fraction of the time compared with conducting or organizing the search yourself
- Access to a vast array of online information services
- Unparalleled library of business and marketing information, statistics, trade journals and within-industry contacts
- Each enquiry handled by a professional research manager (even if it is just providing a single figure).

There are two ways to use the MiC service—as a subscriber or ad hoc. A subscription starts from £1,000 and this money is deposited in an account and used as payment for any information delivered.

If you cannot find the report you want listed in our published titles, simply ask MiC to write it for you. MiC is in a unique position to bring together proven experts on many CPG, leisure, financial and retail markets, together with consumer lifestyle and attitudinal findings, to produce authoritative market studies that will be concise, easy to read and actionable.

PR Research

Mintel's expertise in producing tailor-made market research with maximum media appeal has been built up over many years. Mintel's strength is that we produce independent, reliable research respected by both end users—manufacturers, retailers, financial institutions, leisure companies etc.—and the media. Through MiC, you can commission a report that serves the dual purpose of forming the base for a publicity campaign, yet remains a strategic document to be used in the product development process.

For details on how to set up an account with MiC, or to discuss your latest PR project, simply telephone Sarah Cocker on +11 44 (0)20 7606 4533 or email scocker@mintel.com.