

Hair Colourants - UK - January 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The category has struggled to show growth in 2014, however growth of the temporary colour segment offers opportunities to extend the segment further, possibly by targeting the older demographics. Type of colour/shade available is the most important purchasing factor, with consumers generally sticking to their natural hair colour when using all-over colouring techniques.”—
Roshida Khanom, Senior Personal Care Analyst

This report looks at the following areas:

- Older women are less likely to colour
- Young men are going grey
- Rise in value of temporary colour segment

The hair colourant market is predicted to decline in value by 5% in 2014, largely due to discount retailers offering cheaper brands. However, with 31% of people colouring at the salon in the last 12 months (higher amongst those aged 16-34), the growing availability of online discount vouchers for salon services offered by websites such as Groupon may also be impacting the retail hair colourant market. The period October 2013-October 2014 has seen a rise in value of temporary hair colourants, with the launch of brands such as Bleach, offering bright and pastel temporary colours, driving this. Type of colour/shade, brand name and low price are the three most important purchasing factors in this category, and when it comes to all-over colouring products (such as permanent or semi-permanent colour) consumers stick to shades close to their natural colour.

Within this report we investigate people's natural hair colour and grey levels, as well as most popular dyed shades and top factors influencing purchase of hair colour. This report also investigates the perceptions associated with different hair colour formats (such as liquids, creams and foams).

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Hair Colourants - UK - January 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Products covered in this report

Hair colourants

Excluded

Abbreviations

Executive Summary

The market

Figure 1: Best- and worst-case forecast of UK value sales of hair colourants, 2009-19

Market drivers

Companies, brands and innovation

Figure 2: New product launches, by top ultimate companies, January-November 2014

The consumer

Figure 3: Shade used, October 2014

Figure 4: Top purchase factors, October 2014

What we think

Issues & Insights

Older women are less likely to colour

The facts

The implications

Young men are going grey

The facts

The implications

Rise in value of temporary colour segment

The facts

The implications

Trend Application

Trend: Guiding Choice

Trend: Life Hacking

Futures Trend: Old Gold

Market Drivers

Key points

Age of population

Figure 5: Trends in the age structure of the UK population, 2009-19

Interest in natural and organic products

Figure 6: Purchase of natural/organic toiletries, September 2014

Young women have biggest range of haircare products

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Hair Colourants - UK - January 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 7: Repertoire of hair products usage amongst women, by age, February 2014

Greater guidance could drive experimentation

Figure 8: Attitudes towards point colour, May 2014

Who's Innovating?

Key points

New product launches show different formats

Figure 9: New product launches, percentage share by launch type January 2010 – November 2014

Figure 10: Examples of new product launches, January-November 2014

L'Oréal leads launches in 2014

Figure 11: New product launches, by top six ultimate companies and other, January-November 2014

Figure 12: Launches by L'Oréal in the hair colourants category, January-November 2014

Figure 13: Launches by Bleach Products in the hair colourants category, January-November 2014

Rise in environmentally friendly claims

Figure 14: New product launches, by top claims (based on 2014), January 2013-November 2014

Figure 15: Natural and organic hair colourant launches, January-November 2014

Market Size and Forecast

Key points

Growth and decline in recent years

Figure 16: UK retail value sales of hair colourants, 2009-19

Slow decline predicted

Figure 17: Best- and worst-case forecast of UK value sales of hair colourants, 2009-19

Forecast methodology

Segment Performance

Key points

Temporary colours see the biggest rise in value

Figure 18: UK retail value sales of hair colourants and home perms, by sector, October 2013-October 2014

Market Share

Key points

Brands struggle to show growth in 2014

Figure 19: Brand value shares in hair colourants, 2013 and 2014 (year ending October)

Decline in popularity of foam colourants impacts sales of John Frieda

Companies and Products

L'Oréal

Background and structure

Strategy and financial performance

Figure 20: L'Oréal (UK) Ltd financial performance, 2012-13

Product range and innovation

Figure 21: Examples of new product launches by L'Oréal in the hair colourants market, June 2013-November 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Hair Colourants - UK - January 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 22: Examples of new product launches by L'Oréal in the hair colourants market, June 2013-November 2014 (continued)

Marketing and advertising

Kao

Background and structure

Strategy and financial performance

Figure 23: Key financials for Kao Corporation (global), 2012-13

Product range and innovation

Figure 24: Examples of new product launches by Kao in the hair colour market, June 2013-November 2014

Marketing and advertising

PZ Cussons

Background and structure

Strategy and financial performance

Figure 25: Key financials for PZ Cussons UK, 2012-13

Figure 26: Key financials for PZ Cussons Beauty LLP, 2012-13

Product range and innovation

Figure 27: Examples of new product launches by PZ Cussons in the hair colourant market, June 2013-November 2014

Marketing and advertising

Henkel

Background and structure

Strategy and financial performance

Figure 28: Henkel Limited financial performance, 2012 and 2013

Product range and innovation

Figure 29: Examples of new product launches by Henkel in the hair colourant market, June 2013-November 2014

Marketing and advertising

Procter & Gamble

Background and structure

Strategy and financial performance

Figure 30: Key financials for Procter & Gamble (Health and Beauty Care) Ltd, 2012-13

Product range and innovation

Figure 31: Examples of new product launches by Procter & Gamble in the hair colourant market, June 2013-November 2014

Marketing and advertising

Brand Communication and Promotion

Key points

Advertising spend maintains focus on TV advertising

Figure 32: Main monitored media advertising expenditure on hair colourants, by media type, Jan 2010-November 2014

Selected advertisers

Figure 33: Main monitored advertising expenditure on hair colourants, by top advertisers, Jan 2013-November 2014

Advertising spend is even all year round

Figure 34: Advertising spend by quarter, January 2010-November 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Hair Colourants - UK - January 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brand Research

Brand map

Figure 35: Attitudes towards and usage of selected brands, November 2014

Correspondence analysis

Brand attitudes

Figure 36: Attitudes, by brand, November 2014

Brand personality

Figure 37: Brand personality – macro image, November 2014

Figure 38: Brand personality – Micro image, November 2014

Brand experience

Figure 39: Selected brand usage, November 2014

Figure 40: Satisfaction with selected brands, November 2014

Figure 41: Consideration of selected brands, November 2014

Brand recommendation

Figure 42: Recommendation of selected brands, November 2014

Channels to Market

Key points

Rise of discount stores

Figure 43: UK retail sales of hair colourants, by outlet type, 2013-14 (est)

The Consumer – Grey Level

Key points

Young men have more grey than young women

Figure 44: Grey level, October 2014

Grey level rises amongst middle aged

Figure 45: Percentage of adults with any level of grey, by age

The Consumer – Hair Colour

Key points

Darker colours are most prevalent naturally

Figure 46: Original hair colour, October 2014

People stick to their natural shade for all-over colours

Figure 47: Shade used, October 2014

From silver to gold: older people dyeing to go blonde

Men use darker colours

The Consumer – Products Used

Key points

Young people more likely to use part-colouring products

Figure 48: Home hair colourant products used, October 2014

Highlighting may be used to cover the first signs of grey

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Hair Colourants - UK - January 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Young people use a greater range of products

Three in ten colour at the salon

Figure 49: Usage of hair salon, October 2014

The Consumer – Purchase Factors

Key points

Colour is the most important factor

Figure 50: Top purchase factors, October 2014

The importance of brand name and low pricing

Exclusion of chemicals considered important

Advertising/celebrity endorsement is low priority

The Consumer – Perceptions of Format Types

Key points

Methodology

Creams and foams are more user friendly

Figure 51: Correspondence analysis of format types, October 2014

Low colour ratings

Chalks offer vibrancy with low commitment

Sprays are damaging but alternative formats are fun

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com