

# Still Pampering? Opportunities and Challenges Facing the Global Spa and Beauty Industry

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## Abstracts

### Future bright for skin care

Retail sales of beauty and pampering products for home use will continue to perform well overall, as consumers look to replicate the salon experience at home, either to supplement use of salons and spas, or as an alternative to costly treatments.

Overall, sales of skin care are expected to rise by 15% in real value terms between 2009 and 2014, with growth fuelled in particular by nourishers/anti-agers. The focus in many markets, including the major markets within Europe and Asia, will continue to be on premium and masstige skin care. This segment has proved relatively recession-proof, as women are reluctant to give up their favourite products, even in times of hardship, and will benefit from any improvement in the economy. Manufacturers will continue to be innovative in the fast-growing areas of anti-ageing and anti-cellulite/slimming products, and will continue to support new products with effective marketing, responding to consumers' desire to look and feel good.

### Natural products will prevail

As in the salon sector, the trend towards natural ingredients and fewer chemicals in skin and hair care products will become more pronounced over the forecast period, and companies launching natural and organic products are expected to enjoy a healthy performance. Manufacturers will need to provide a more holistic approach to new product development, featuring key ingredients such as botanical and herbal extracts and avoiding artificial chemicals, such as parabens and sulphates. Europe is expected to see the introduction of organic product regulations in skin care. Legislation regarding organic claims on cosmetics products could be applied from 2010 or 2011, according to

trade sources.

### **Combining convenience with efficacy**

The mature hair care sector is forecast to see gradual growth over the forecast period, with sales set to increase by 10% overall in real value terms. Consumers will be looking for convenience as well as effectiveness. Therefore, colourants which offer both attributes, such as L'Oréal's Excell 10/Excellence to Go and Nice 'n' Easy Perfect 10, are likely to be successful, while new product development will focus on the achievement of ever quicker results. Also in line with trends towards convenience, in many sectors products with multifunctional features, such as moisturising, anti-ageing and sun protection in one product, should continue to gain prominence as the technology improves and becomes more affordable.

### **Salon hair care to face further threat from diverted brands**

The salon hair care sector is expected to recover somewhat as the economy improves and consumers increase their frequency of salon visits. However, salon hair care will continue to face ever increasing competition from the mass retail sector, and could see an overall rise of less than 3% in real value over the forecast period. In the US, value-oriented "professional" brands, like TRESemmé and Alberto-Culver's Nexxus, will continue to take share away from salon products.

The recent trend of promoting mass brands through offering "more for less" is a direct threat to the rebound in salon hair care products, as manufacturers convince consumers that mass products can offer similar benefits at a fraction of the price. A company like Alberto-Culver, which has minimal exposure to the salon channel, can freely promote its brands as a cost effective alternative to salon hair care. However, Procter & Gamble (which owns Wella), and L'Oréal (which sells a high proportion of its products through salons) should tread carefully to avoid devaluing their professional brands.

### **Mixed future for self-tanning**

Self-tanning products will perform well in many European markets, as people become more aware of the dangers of sun exposure and indoor tanning. However, at the same time, self-tanners will continue to face strong competition from daily moisturisers with gradual self-tanning properties. Furthermore, self-tanners are not expected to achieve growth in the US market, where they continue to be unpopular, or in Asia, where the trend continues towards whiter skin tones. Overall, sales of self-tanners are forecast to

see growth of less than 3% over the forecast period, while GST products will perform better.

### **A future in pills?**

The market for beauty products and services may in the longer term be impacted by the development of products that can be taken orally to achieve similar results, although this defeats the purpose of the self-pampering aspect of treatments.

Both the hair colourants and self-tanning segments could see the future development of drugs that restore colour to hair, or produce skin pigmentation akin to the result of tanning. In October 2009, L'Oréal announced that it was in the process of developing a new oral pill and hair care range that is designed to turn grey hair back to its original colour. Although the treatment is still some way off (L'Oréal hopes to develop it within 10 years), this type of "cosmeceutical" could revolutionise both the hairdressing and hair care products industry.

### **Appliances to be driven by new product development**

Both hair care appliances and other personal care appliances are set to see steady growth in real value terms over the forecast period, of 21% in both sectors. Sales will be driven by new product innovation, with salon-style products designed to mimic professional appliances and incorporating greener features.

Euromonitor International's Still Pampering? Opportunities and Challenges Facing the Global Spa and Beauty Industry Strategy Briefings is a series of reports that alert you to global trends predicted to influence consumer markets. They offer insight to changing market conditions and the opportunities and challenges companies need to consider to maintain a competitive advantage.

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