



2nd Edition

Professional Hair Care Retailing and Amazon Impact on the U.S. Salon Hair Care Market

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Base Year: 2019

Forecasts to 2024

Regional Coverage: United States

Salon hair care brands are increasingly exploring possibilities of take-home sales of shampoos, conditioners, and styling products outside the salon. In the United States, where take-home sales are prominent, the selling of professional products outside the salon environment is undertaken by many marketers looking for opportunities to increase their overall sales in department stores, specialty stores, or online. E-commerce has been the fastest-expanding channel, and Amazon is considered a true game changer in the professional industry, acting not only as a reseller of products to consumers but more recently as a distributor of professional products on the market.

This Report Will Help Subscribers to:

- Understand which brands have pursued the strategy of developing “retail” sales of professional products
- Explore which channels offer the best growth opportunities outside the salon
- Better target retailers they want to work with
- Better plan their sales by channel by understanding the outlook
- Understand the current structure of distribution of salon hair care products on the U.S. market
- Take a closer look at all the initiatives Amazon has taken in last few years toward cooperation with stylists/salons and salon hair care product marketers
- Assess the role Amazon already has in the distribution of professional hair care products
- Understand what impact the launch of the Amazon Professional Beauty Store has on the purchasing behavior of stylists and salons in the United States
- Assess opportunities and threats linked to the so-called “Amazon Effect” in terms of professional hair care business.



Report Contents

Introduction

Market Overview

- Review of professional hair care market performance by channel and sub-channel
- Channel evolution
- Key channel and retailer highlights
- Outlook to 2024

Channel Profiles

For each channel listed in Table 1, the following is provided

- Channel developments
- Number of doors (where applicable)
- Sales and door count by leading retailer
- Estimated sales and growth by sub-channel (where applicable)
- Sales of salon hair care products by product category (shampoos, conditioners, styling products)
- Key retailer snapshots
- Outlook

Amazon Impact on the Professional Hair Care Industry

- Amazon
 - SWOT analysis in terms of salon industry
- Salon perspective-a
 - Current purchase patterns of salons
 - % of salons that already shop through Amazon
 - Impact on brand portfolio carried
 - Willingness to purchase on Amazon
 - Professional Brands Store
- Stylist perspective-b
 - Current purchase patterns of salons
 - % of salons that already shop through Amazon
 - Impact on brand portfolio carried
 - Willingness to purchase on Amazon
 - Professional Brands Store
- Outlook
 - Impact of Amazon on marketers
 - Impact of Amazon on distributors
 - Impact of Amazon on salons and stylists
 - Channel breakdown in 2024

a- Based on structured survey with 200 salons

b- Based on structured survey with 200 independent stylist

* Subject to charter subscriber input



Professional Hair Care Retailing And Amazon Impact on the U.S. Salon Hair Care Market:

Table 1: Channels to be Profiled

Department stores

E-commerce

Mass outlets (food, drug, mass, club) only U.S.

Specialty stores (cosmetic specialty, beauty supply stores)

Table 2: Retailers Featured

Amazon

Beauty Brands

Bluemercury

Loxa Beauty

Neiman Marcus

Nordstrom

Sally Beauty

Sephora

Ulta





Scope

This study will look beyond the salon to deeply explore the other channels where professional hair care brands are sold, especially e-commerce and specialty/prestige outlets.

Professional Hair Care Retailing-Market Overview

- This study provides a thorough assessment of sales to consumers (not professionals)
- The scope is limited to professional hair care (conditioners, shampoos, and styling products)
- Professional brands that generate a majority of sales through salons
- Salon sales are excluded from the analysis
- Geographical scope includes the United States
- The study covers both brick-and-mortar locations, as well as online retailers

Amazon Impact Analysis

- Amazon’s Impact on the U.S. Salon Hair Care Market will provide a detailed independent appraisal of the role of Amazon as an important game-changer in the salon industry in the United States.
- Geographic scope: United States
- Covers distribution of all professional hair care products in the U.S. market
- Focuses on the current and future role of Amazon in distribution of professional hair care products
- Two key sources of information for this report are: in-depth unstructured interviews with salon hair care marketers and structured survey over the phone and online with 400 salons and stylists in total across the United States

Key Benefits

This comprehensive report contains two volumes, which together provide a thorough picture of the market. The first part, which is the market overview, enable subscribers to exploit business opportunities outside the traditional place where salon hair care products are sold—the salon. Showing the retailing dynamics in the strategic market of the United States allows subscribers to assess the opportunities and track what sales strategies their competitors are undertaking. The second part is dedicated to understanding what impact Amazon developments have had on the salon industry and what potential impacts can be seen in the coming years. Findings in this part are largely developed based on extensive surveys with traditional salons as well as independent stylists.

- Quantifies sales that occur outside the salon and sales by purchase channel, focusing on hard-to-track non-traditional channels
- Delivers the information and insights required to capitalize on changes happening in sales of professional products
- Includes one day of consultation time with members of the research team, which can be used for assistance with plans or to explore related industry information
- Understand purchasing patterns of both independent stylists and salons to better address their needs
- Identifies and explains key purchase channels for professional hair products outside the salon
- Assess the opportunities and threats coming from cooperation with Amazon while selling professional hair care products.
- Understand how your competitors’ distribution is organized and the role e-commerce has in it.



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60 years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

In addition to in-depth unstructured interviews, for the purpose of this study, Kline will conduct telephone and online surveys with a total of 400 hair salons as well as hair stylists spread across the U.S. territory, in order to better understand the current and potential impact of Amazon on their brand choices and other purchase patterns.

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for 60 years.

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