

TO GRAY OR NOT TO GRAY

A look into how brands, retailers and consumers are building out the aging-hair care category. BY EMILY BURNS

AFTER THE CANNES FILM FESTIVAL IN 2021, Andie MacDowell's name was trending, not for her film "Annette" or her sparkly Prada gown. Instead, the actress garnered attention for embracing her natural gray hair on the red carpet.

The star's choice to go natural, which she made in the midst of the COVID-19 pandemic, was indicative of a larger trend that has only continued to grow since 2021. An increasing number of people are forgoing hair dye and instead opting for their natural hair hue as they age.

"Gray hair, particularly for women, has evolved a lot," said Evelyn Wang, beauty veteran and silver-hair advocate. "Women [are] realizing there's an alternative to coloring your gray, that you can also embrace your silver. It's becoming more and more acceptable."

Now, consumers, brands and retailers are all looking at the potential of the aging-hair care market, in terms of overall hair health. On track with the growth of the menopause market, several key concerns are being addressed, including hair density, texture, coarseness and of course, grays.

According to experts, as the hair ages it changes. "We start going a little bit on the gray side and our natural hair pigment leaves us," said New York-based salon owner, hair stylist and trichologist Greg Ruggeri. "A lot of people also complain that their hair feels dry and brittle. It's snapping off."

Such symptoms are often due to hormonal changes and a decrease in oil production that typically occur during menopause. With this, caring for aging hair may require an updated routine — think extra strengthening and softening ingredients, formulas that brighten brassy grays, supplements that address nutrient deficiencies and even products that may prevent or reverse pigment loss.

One brand geared toward aging hair is Better Not Younger, which launched in 2019 entirely focused on the 40-plus consumer. The brand has 28 stock keeping units, priced from \$24 to \$79, and is sold



direct-to-consumer and at Ulta Beauty; retail sales are expected to reach \$12 million in 2023, according to industry sources. Founder and chief executive officer Sonsoles Gonzalez said her impetus was the lack of products or education for aging hair.

"The industry has always focused on just one sign of aging, which is hair that grays," she said. "It has required a lot of education [to build the category] because when you ask women, 'Is your hair changing,' and then you ask them why and they're often confused... There's not [a] full understanding."

Better Not Younger has taken an education-driven approach to help consumers understand why their hair is changing and how to care for it, including blog posts, content created by hairstylists and working with retailers to build out the category.

In building her business, Gonzalez has recognized

another trend — women aren't only looking for additional treatment products for aging hair, but an entire routine of multifunctional styling products that address the signs of aging as well.

"We've seen a huge growth on the styling side of our business... Women want that instant gratification," she said, noting the brand's Lift Me Up Hair Thickener Spray, \$37, is now a bestseller.

Nutrafol, which was acquired by Unilever, is also seeing growth in addressing the signs of aging hair. Cofounder and chief executive officer Giorgos Tsetis attributes this to the rise in perimenopause and menopause-related content and brands. With this, the brand's Women's Balance, \$88, a hair-growth nutraceutical formulated for women 45-plus, has outperformed the original women's formula for those between 18 and 44.

"It's by far the winning core product," said Tsetis, noting the product is formulated to address the hormonal shifts women experience starting with perimenopause, which can often lead to hair thinning.

Ruggeri affirmed that clients are more interested in ingestibles geared toward hair health. "They are being more mindful of supplements, trying to go the natural route and do things that are more natural to their bodies as opposed to doing any harsh chemicals," he said, pointing to brands like Act + Acre and Vegamour in addition to Nutrafol.

Creating a community around such topics is also increasing, such as Nutrafol's "Shed The Silence," a social forum where more than 6,000 members can share their personal experiences, ask questions and connect. "There's all these questions that arise so to build a community around these women is something that has been very, very successful," said Tsetis. "We're learning a lot through that because we're understanding then how to further optimize the messages or potentially further product development down the road."

For those in MacDowell's camp looking to embrace grays, brands like L'Oréal are rising to the challenge. L'Oréal's new Ever Pure Silver Care Shampoo, \$10, and Conditioner, \$10, are formulated with peptides to brighten and soften strands, as gray can become brassy and coarse. L'Oréal also tapped MacDowell to be the face of this new collection.

"The healthy aging-hair care category has strong potential for growth," said Stacey Goldstein, vice president of U.S. hair care marketing at L'Oréal Paris. "There were huge behavioral beauty shifts that happened during COVID[-19] when consumers were unable to access salons and color their hair."

According to an internal survey from the brand in 2022, 24 percent of consumers said they previously covered their grays but no longer do. "As such, there is a whole new set of consumers seeking to care for their gray or silver hair for the first time. With new consumers comes new opportunity for market growth," Goldstein said.

Stylists have also seen clients transition from constant coloring to going all gray. "The women who have embraced their gray hair, they like the freedom," said Robin D. Groover, chief hair officer and head of research and development at Myavana, a hair technology company that uses data insights to provide personalized solutions for specific hair concerns including graying.

For many brands, it's clear that consumers are increasingly more interested in caring for their gray strands than covering them. According to Philip Kingsley, 20 percent of their hair quiz participants select gray as their hair color. And 26 percent of Better Not Younger's customers who respond to their hair quiz say they are no longer covering their grays, up from about 15 percent pre-COVID-19.

"Once your whole head goes white, that's when it's easier because then it just looks like a uniform color of silver, which can look really beautiful,

L'Oréal
Ever Pure
Silver Care
Shampoo and
Conditioner

Arey's lineup.

Nutrafol
Women's
Balance

Better Not
Younger Lift
Me Up Hair
Thickener

rather than grays interspersed with your natural hair pigment, which can still look beautiful but a lot of people find that less easy to embrace," said Anabel Kingsley, trichologist and Philip Kingsley brand president.

From a product perspective, purple-toned products to counteract brassiness are popular in Kingsley's range, as is its hero product, Elasticizer, which strengthens the hair and prevents breakage.

"We focus more on the holistic aspect of hair health," Kingsley said. "We do have a product for graying, but we also recognize that things like pre-shampoo, treatments, nutrition, stress, all of those are also going to help maintain the quality of hair because stress has also been linked to early graying."

There is also progress being made for those who experience premature graying. The Los Angeles-based Arey is working to build the category of gray prevention and reversal products with its Not Today, Grey supplement, \$34, that uses 13 ingredients, including copper and a slew of B vitamins, to address oxidative stress and melanin loss, two key causes of graying. The brand says to reverse the grays, someone must still have melanin in the root, likely those who have gray strands rather than all white. Furthermore, it says the results are most effective on those who have less than 30 percent gray strands overall.

"It's happening to people in their late teens up until their 80s, so it's a huge market," said cofounder and CEO Allison Conrad, noting gray hair is more pervasive than hair loss. Investors are bullish. Arey received \$4 million in funding in November 2022, and has experienced 1,100 percent year-over-year growth in revenue since its 2021 launch.

"The core belief was that there's a huge market opportunity to better serve consumers with aging hair concerns, and that everybody deserves access to the great efficacious products that you see in

other categories like color correction or post-hair color treatments," said Alaina Hartley, principal at Greycroft, which invested in Arey.

According to Mintel, consumers are increasingly interested in this market — 36 percent say they have not tried a gray prevention or reversal product but are interested in doing so.

As it pertains to at-home and in-salon hair coloring, supplements and the trend of going gray are not expected to be category killers. Instead, consumers want an array of options. "Gray coverage remains the most popular service in salons, but gray transformation services like Matrix Silver Lining allows a new client journey to be created in the salon," said Leslie Marino, L'Oréal president of professional products division for the United States.

According to a 2022 study from L'Oréal and Radius, 44 percent of women between 55 and 74 are embracing their grays. "Therefore, new services such as glosses and glazes, highlights to create dimension or adding undertones are all critically important to the health of this valuable segment," said Marino.

So will antiaging hair products ever gain the scale of antiaging skin care? It's still early days. "Aging hair as a category is definitely an opportunity that we are only just beginning to explore," said Meghan Lim, senior merchant at Credo. "We've seen pockets of success such as the exclusive launch of Arey and the popularity of hair and lash regrowth products."

According to Gonzalez, it's easy for brands like Better Not Younger to get lost in the hair thinning aisle, therefore emphasizing the need for an aging-specific section. "Ulta Beauty moved us to part of the store that says hair care for aging hair, and it's really helped women understand that there is such a thing as hair care that's for aging hair," she said, noting the brand experienced an 80 percent growth from the placement shift. "It's validated the concept and the idea." ■