

BLACK HAIRCARE – US – 2023

Black consumers are looking to stretch out the cycle between product purchases and looking to longer-term protective or low-manipulation styles.



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Black Haircare - US - 2023

This report looks at the following areas:

- Trends in Black consumers' hair texture and styles worn
- Types of hair products purchased by Black consumers and purchase locations
- Attitudes toward salons, haircare and perceptions of hair styles and representation
- Black consumers' expenditures and forecast of haircare products, relaxers and home hair color
- Innovative products, marketing communication and opportunities to target Black haircare consumers
- Key trends in haircare and market factors impact Black haircare consumers



Black consumers are looking to stretch out the cycle between product purchases and looking to longer-term protective or low-manipulation styles.

Overview

For Black consumers, haircare has always been an important part of their lifestyle and indicator of their identity. As Black consumers' lifestyles change, their needs and wants around haircare evolve. Black consumers prioritize self-expression and convenience but also lean into value. To this point, 57% of Black consumers see more value in doing their hair at home than the salon, which shows that BPC brands have an opportunity to capture this group. Meanwhile, 60% of Black consumers agree that there is a lot of pressure for their hair to look a certain way within the Black community. These pressures may be an indicator to the styles consumers wear and ultimately the products they purchase, which sets the tone for many, in terms of identity. These pressures are why Black consumers are looking for a narrative shift in Black haircare that focuses more on their lifestyle and their personal needs.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Hair texture

- Hair texture/type is foundational to understanding the haircare needs of Black consumers
- Views of hair texture remain relatively consistent from 2020-23
- The majority of Black haircare consumers identify with a coily hair texture
 - Graph 1: Black consumers' natural hair texture, 2023
- Views of hair texture remain relatively consistent from 2020-23
 - Graph 2: Black consumers' natural hair texture – NETs, 2020-23
- Hair type, texture and density play a significant role in determining the possibilities for consumers' hair
- Facilitate improved education for BPC brands and stylists around coily/textured hair
- Be mindful of the difference between curly and coily/kinky hair
- Salons and stylists have an opportunity with coily-haired consumers, Type 4C in particular
 - Graph 3: attitudes toward value of salons (any agree), by hair type – NETs, 2023
- Target Type 4C males with barber and hair services
 - Graph 4: Black consumers' natural hair texture, by gender, 2023
- Promote specialized offerings for Type 4 hair
- Just half of consumers see their hair texture represented in ads
 - Graph 5: attitudes toward representation of hair texture (any agree), by hair type – NETs, 2023
- Transform how coily hair is presented in ads to help consumers feel more connected
 - Graph 6: attitudes toward appearance and representation (any agree), by generation, 2023

Hair styles worn

- More than eight in 10 Black consumers have worn a natural hairstyle from 2017-23*
- Black consumers are still sporting their natural tresses
 - Graph 7: hairstyles worn by Black consumers in the past three years, 2023
- More than eight in 10 Black consumers wore a natural hairstyle from 2017-23

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- Graph 8: hairstyles worn by Black consumers in the past three years, 2020-23
- Hair styles are an indicator of consumers' identity and beliefs
- Spotlight on Prose Beauty: communicate brand alignment through messaging and product development
- Millennial women are more likely to have worn relaxed hair
 - Graph 9: hairstyles worn in the past three years, by Black women and generation, 2023
- Relaxers help Millennial women feel a sense of control
- Spotlight on Avlon Texture Release: offer consumers alternatives with less harsh chemicals
- Avlon Texture Release System
- Gen Z is more likely to wear styles that don't get as much attention
 - Graph 10: select hairstyles worn in the past three years, by Gen Z, 2023
- Gen Z women are most experimental across styles; men gravitate toward afros/low-cut afros and locs
 - Graph 11: select hairstyles worn in the past three years, by Gen Z and gender, 2023
- Gen Z prioritizes self-expression, hair style is just one facet of that
- Gen Z is focused on individuality and hair is a perfect medium to communicate their interests
- Black men stay consistent with their hair styles
- Gen X men and older opt for low-cut looks
 - Graph 12: hairstyles worn in the past three years, by Black men and generation, 2023
- Improve formulas and include lifestyle claims on packaging to help enhance Black men's hair grooming routine

Hair products purchased

- Shampoo and conditioner are consistently consumers' top purchase
- Haircare purchasing habits have resumed – the lows of 2021 are in the past
 - Graph 13: haircare products purchased in the past 12 months, 2020-23
- Hair oil addresses two key concerns: moisturizing and economizing
- Black women's purchase of hair oil is nearly on par with both rinse-out conditioner/treatments and leave-in conditioners
 - Graph 14: haircare products purchased in the past 12 months, by gender, 2023
- Premium products for niche markets, hair oil is a top contender for haircare routines
- Spotlight on Bread Beauty Supply: address niche concerns in the context of a multi-purpose product
- Black men 18-34 purchase more hair products than older men
 - Graph 15: haircare products purchased in the past 12 months, by Black men and age, 2023
- Help young Black men foster community without judgement
- Connect haircare with mental wellness through company partnerships
- Gen X are top purchasers of edge control products
 - Graph 16: haircare products purchased in the past 12 months, by generation, 2023
- Gen X is the most experienced of the active haircare consumers and have seen Black haircare transform over time
- Brands can show the longevity of their products by showcasing how they are used by generation

Product purchase location

- Mass merchandisers are popular for in-store Black haircare purchases

- Amazon rising: mass merchandisers lead for in-store purchasing, though its dominance continues to be challenged
 - Graph 17: haircare product purchase location – in-store vs online, 2023
- In-store shopping locations remain relatively stable, but mass merchandisers lose traffic to Amazon online
 - Graph 18: haircare product purchase location – in-store, 2022-23
 - Graph 19: haircare product purchase location – online, 2022-23
- Integrate omnichannel to increase accessibility
- Young consumers look to dollar stores for haircare products
 - Graph 20: haircare product purchase location – in-store – mass merchandisers and dollar stores, by age
- Create product tiers of lower-priced items for discount channels more premium items for mid-range and higher-end stores

Attitudes toward salons

- Education can improve salon experience and re-establish consumer base
- Professional stylists are important advisors
- Improving professionals' knowledge of Black haircare may help to improve the salon experience
 - Graph 21: Black women's attitudes toward salons, 2023

Attitudes toward haircare

- YouTube viewers find the value in at home haircare
- YouTube serves an opportunity for consumers to engage with brands in a relaxed way
- Consumers want to see how product fit into their lifestyle
- Millennials and Gen Z men are open to using products that are not "curly" specific
 - Graph 22: uses mainstream haircare product (any agree), by generation and gender, 2023
- The pressure that Black consumers feel for their hair to look a certain way may make some reluctant to try new styles
- Leverage Millennial and Gen Z's hair "rebellion" to help guide the future of Black haircare
 - Graph 23: looks are a reflection of beliefs (any agree), by generation and gender, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Notable launches target coily/textured hair
- Innovative launches

Marketing and advertising

- Inclusive campaigns pave the way for more tailored products for curly hair

Opportunities

- A need for scalp care education
- NPD can focus on hair health to appeal to Black consumers
 - Graph 24: haircare and styling launches for curly/coily hair* by select hair health claims, 2022-23
- Medicalise haircare to prove its worth

THE MARKET

Market size and forecast

- Black consumers' spending on regimen haircare products continues bounce-back in 2023...
- ...but growth then slows and is forecast to stall
- Black consumers' expenditure for regimen haircare products
- Black consumers' expenditures and forecast for regimen haircare products
- Inflation-adjusted expenditures and forecast for regimen haircare products
- Black consumers' expenditures for regimen haircare products – by segment
- Black consumers' expenditures for regimen haircare products – by segment, cont.
- Black consumers' average annual spending for regimen haircare products
- Despite years of declines, relaxer sales are forecast to stabilize over the next five years
- Black consumers' expenditures and forecast for relaxers
- Inflation-adjusted expenditures and forecast for relaxers
- Hair color's pandemic boost remains and growth in sales continue to climb slowly
- Black consumers' expenditures and forecast for hair color
- Inflation-adjusted expenditures and forecast for hair color

Market factors and context

- US economic indicators continue to trend positive even as costs remain high
- Black consumers are still feeling the impacts of inflation, though inflation cools moving into 2023
 - Graph 25: Consumer Price Index change from previous period, 2020-23
- Health risks of hair color could dampen sales
- Consumer awareness leading to lawsuits
- The CROWN Act continues to generate impact within the US
- Predictions of the CROWN Act impact
- Increasing education about Black hair in cosmetology schools
- L'Oréal's Professional Products Division introduces The Texture of Change movement

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

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