BLACK HAIRCARE – US – 2024

With varying needs for textured hair, a growing consumer base demands that Black haircare evolve.

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Black Haircare – US – 2024

This report looks at the following areas:

- Trends in Black consumers' hair textures and styles
- Hair products purchased by Black consumers and retailers shopped
- Black women's haircare segments based on attitudes toward hairstyles and care
- Haircare brand preferences and purchasing pain points
- Skill level, frequency of experimenting and lifestyle elements impacting hairstyles and attitudes
- Interest in haircare innovations and ingredients
- Key haircare trends for Black men
- Innovative products, marketing communications and opportunities to target Black haircare consumers

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Overview

The Black haircare market is shifting as major brands seek to expand their consumer base by targeting hair texture, type and needs – rather than ethnicity – for a broader target. Within this dynamic, Black haircare consumers see both pros and cons. While the mainstreaming of textured hair brings greater acceptance, reformulations and discontinued products are a pain point. Loss of cultural representation and authenticity are also concerns.

Black haircare consumers prioritize convenience and practicality. Fewer hairstyles and product purchases, along with interest in wigs, weaves and extensions as a cost-saving option, reflect a demand for easy-to-use solutions. Educated and budget-conscious buyers seek quality essentials, sticking to what works for their specific needs. Black men prefer predictable, reliable products but also present opportunities for brands to develop simple, effective solutions, especially for low-maintenance styles like braids and locs.

Brands can innovate by creating specialized products for protective styles and enhancing care for wigs, weaves and extensions. As consumers seek tools and formulations that improve their current routines, brands should support these trends and meet Black consumers' specific needs, focusing on quality, convenience and cost effectiveness.

Report Content

EXECUTIVE SUMMARY

- Hairstyling products
- Hair color

Market/brand share

- Black haircare sales from P&G drives gains; Unilever, PDC, L'Oréal show declines
- Shampoo: Unilever's Shea Moisture dominates, but loses share as sales dip; P&G gains share on strong sales from Mielle Organics
- Conditioner: stronger segment gains from sales of Mielle, Camille Rose, African Pride; Shea Moisture keeps top position, Mielle closing in
- Hairstyling products: Eco takes number 2 spot from Cantu, Shea Moisture maintains top position by a wide margin even while sales slip
- Hair color: major brands' sales decline slightly, Clairol bucks the trend with a 7.1% gain
- Relaxers: total MULO sales decline; African Pride is a bright spot in the segment with a 7.8% increase

Brand spotlight

- Camille Rose
- Popular Camille Rose products
- Briogeo
- OLAPLEX
- Mielle Organics
- Pattern Beauty
- PATTERN Beauty

CONSUMER INSIGHTS

The Black haircare consumer: fast facts

The Black haircare consumer: fast facts, continued

Black women's haircare segments

- Four haircare segments among Black women differentiated by distinct attitudes toward their hair
  - Graph 4: haircare segments among Black women, 2024
- Evelyn – Seasoned Naturalist
- Keisha – Student Stylista
- Robyn – Confident Curator
- Marquita – Balanced Millennial
- Attitudes and perspectives vary by segment
  - Graph 5: perceptions of haircare and styles, by Black women's haircare segments, 2024

Hair texture

- Hair texture remains the basis for identifying hair type classification

- Type 4 hair remains the most common, but has declined while Type 3 hair has increased
  - Graph 6: Black consumers' natural hair texture – NETs, 2020-24
- Diversifying hair textures may disrupt the Black haircare market and require brands to address the profile of the Black consumer
- More men than women view their hair as coarse; educate men on the implications of hairstyle on hair texture
  - Graph 7: Black consumers' natural hair texture – Type 4A-4C, by gender, 2024
- Black consumers living in the West are more likely to have Type 3 hair
  - Graph 8: Black consumers' natural hair texture – Type 4 and 3 (NETs), by region, 2024

Hairstyles worn

- Overall, natural hair is on top, but heat styling, braids and weaves/extensions are taking over styling preferences
  - Graph 9: hairstyles worn by Black women in the past three years, 2024
- Black women show a slight decrease in variations of hairstyles; consumers may be styling less to prioritize convenience
  - Graph 10: hairstyles worn by Black women in the past three years, 2020-24
- Dedication to wigs and relaxers show an opportunity to fill a gap
  - Graph 11: hairstyles Black women currently wear, 2024
- Consumer sentiment about the popularity and acceptance of loc styles is affirmed as locs have seen a slight increase over the years
  - Graph 12: hairstyles worn in the past three years – locs, by gender, 2020-24
- General societal changes, along with the impact of legislation, may lead to more comfort with wearing locs
- National Loc Day celebrates the beauty of locs and increased acceptance
- Braided styles are popular with Gen Z and Millennial women
  - Graph 13: hairstyles worn by Black women in the past three years – braids (NET), by generation, 2024
- A desire for convenience, life changes and general preferences will evolve hairstyling needs
  - Graph 14: attitudes toward hairstyles (agree), by gender, 2024

Haircare products purchased

- Product purchases have slightly decreased in 2024, aligning with consumers' styling preferences for ease and convenience
  - Graph 15: haircare products purchased in the past 12 months, 2020-24
- Potential growing demand for products to help keep braids, wigs and loc styles refreshed
- Women are the primary consumers within the Black haircare market
  - Graph 16: hair products purchased in the last 12 months, by gender, 2024
- Edge control brands may be missing the mark with 4C consumers
  - Graph 17: hair products purchased in the last 12 months – edge control, by Type 4A-4C natural hair texture, 2024
- Although edge control may not hit the mark, sleeker hair is in for 4C consumers as relaxer purchases significantly increase
  - Graph 18: hair products purchased in the last 12 months – relaxer, by Type 4A-C natural hair texture, 2023-24
- Gen Z embraces cost-effective haircare options with oils and gels
  - Graph 19: hair products purchased in the last 12 months – hair oil and hair gel, by generation and gender, 2024

- Help parents of toddlers manage their children's evolving haircare needs

  - Graph 20: hair products purchased in the last 12 months – styling/curl cream, by parental status and age of children, 2024
- Styling is an important step for curly- and coily-haired kids
- Children's haircare line Afro Unicorn has success at Walmart, Target and CVS
- West Coast Black consumers drive a surge in hair gel purchases; consider climate and creative lifestyles

  - Graph 21: hair products purchased in the last 12 months – hair gel, by region, 2024

Retailers shopped

- Two thirds of consumers buy haircare at mass merchandisers

  - Graph 22: retailers shopped for haircare (online or in store) – NET of any haircare product, 2024
- Mass merchandiser dominance is less pronounced within hair/scalp treatments, hair color and relaxers

  - Graph 23: retailers shopped for haircare products (online or in store), by product type, 2024
- Increasing pressure on retailers to remove toxic products from their shelves
- Online options are accessible and convenient

Brand preferences

- Haircare shoppers may be enticed away from favorite brands
- Women's focus on brands doesn't necessarily mean "loyalty"
- Haircare needs (ie product more so than brand) drive purchasing

  - Graph 24: approach to shopping for haircare products – product and brand types, by gender, 2024
- Younger women's focus on brands doesn't necessarily mean loyalty

  - Graph 25: Black women's approach to shopping for haircare products – product and brand types, by age, 2024
- Potential for private label? Perhaps
- Walmart announces plans to implement strategy to reorganize haircare products by hair type
- Dove, Pantene and SheaMoisture are top-mentioned brands across shampoo/cleansers, conditioners and hairstyling products
- Mass-market brands' extensive product lines offer an affordable and accessible solution inclusive of all hair types
- Inclusive campaigns from top brands set the tone for more NPD for curly hair

Pain points

- Consumers may be altering their haircare routines due to more limited product accessibility
- Despite efforts toward inclusion, stigma against natural Black hair still exists...even within the Black community

  - Graph 26: Black women's attitudes toward natural hairstyles and work/professional settings (any agree), by age, 2024
- While judgement affects consumers overall, Black women aged 18-34 struggle to find their personal style due to others' expectations

  - Graph 27: attitudes toward expectations and feeling judged by others (any agree), by gender and age, 2024

Skills and experimentation

- Experimentation has grown; consumers show interest changing their hairstyles

- Experimentation has increased over the years; both men and women show interest in changing their hairstyles
  - Graph 28: frequency of experimenting with new styles or trends, by gender, 2024
  - Graph 29: frequency of experimenting with new styles or trends, 2019 vs 2024
- Consumers' styling skills have drastically improved over the last five years; many may be experiencing DIY fatigue
  - Graph 30: skill level in styling their own hair, 2019 vs 2024
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- Age or will? Consider how consumers' sentiment about hair as they age impacts their perceived skill level
  - Graph 32: skill level in styling their own hair – novice, by age, 2024
- Parents' expertise in hairstyling creates opportunities for brands to support their experimentation
  - Graph 33: skill level in styling own hair, by parental status, 2024
  - Graph 34: frequency of experimenting with new styles or trends, by parental status, 2024
- Promote the importance of bonding for parents managing their "little's" haircare

Lifestyles, hairstyles and haircare attitudes

- Weaves and wigs help Black women experiment while protecting their hair
- As more Black women lean on wigs and extensions to minimize the impact on their natural hair, brands have an opportunity for product innovation
  - Graph 35: Black women's interest in hair products for weaves, wigs or extensions and reasons for use, by age, 2024
- Bundled products for everything-you-need wig care offers affordability and convenience
- Consider the hair and scalp beneath wigs/braids/weaves
- Show how haircare products fit into Black consumers' lifestyles
  - Graph 36: interest and use of different haircare products (agree), by gender, 2024
- Finances are an important aspect of Black consumers' haircare routines
  - Graph 37: hairstyling at home, by gender, 2024
- General concern for product ingredients is consistent, but attitudes toward routines and the range of products vary by age and gender
  - Graph 38: attitudes toward haircare products (any agree), by gender and age, 2024
- Although style experimentation declines with age, older Black women are still a prime market
  - Graph 39: Black women's attitudes toward hairstyles (any agree), by age, 2024
- Hair texture can influence consumers' perspectives on convenience
  - Graph 40: attitudes toward hair (agree), by natural hair texture – Type 4C-3A, 2024

Innovation and ingredients

- Highlight innovation that promotes hair growth, scalp health and moisturizing across different product types
  - Graph 41: interest in haircare innovations, by Black consumers and all, 2023-24
- Educate consumers on the benefits of peptides as their function aligns with haircare needs, but as an ingredient, interest in them lags
  - Graph 42: interest in haircare ingredients, by Black consumers and all, 2023-24
- Shampoos formulated with familiar oils highlighting scalp health for gentle but efficient cleaning

- Lead with ingredients
- Disruptive ingredient-led innovation
- Appeal to younger and middle-aged women with fermented ingredients
  - Graph 43: interest in fermented ingredients for haircare, by gender, age and gender by age, 2024
- Strength and shine with rice water rinse and treatments

Haircare for men

- Low-cut styles are the most common for Black men
  - Graph 44: hairstyles worn by Black men in the past three years, 2024
- Less-popular men's styles – natural braids/cornrows and locs – have trended up over the past five years
  - Graph 45: hairstyles worn by Black men in the past three years, 2020-24
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  - Graph 46: frequency of experimenting with new styles or trends – never, by gender, 2024
  - Graph 47: skill level in styling own hair – expert, by gender, 2024
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- Brands are missing the mark on what should be a mainstay for Black men in haircare
  - Graph 49: "My favorite product has been discontinued and I am struggling to find an alternative," by gender and age, 2024

INNOVATION AND MARKETING STRATEGIES

Launch activity and innovation

- The Mint by Richualist addresses concerns around moisture absorption and retention for textured hair
- Brands can make DIY feasible with products and tutorials
- Temporary hair color offers consumers experimentation without the commitment
- Added-value oil-based innovations can expand
- AI technology is improving wig customization, and hence accessibility for consumers
- Expanding haircare options for boys

Marketing and advertising

- A universal approach is becoming more popular for textured haircare brands
- Positive shifts in brand messaging: spotlight on Soft Rows
- Brands are establishing in-person credibility through festival activations and pop-up events
- CurlMix rebrands to be more shelf-friendly and convey mature luxury as it enters Ulta Beauty

In summary: key implications and recommendations

APPENDIX

- Consumer research questions
- Consumer research questions (continued)
- Consumer research methodology
- Consumer qualitative research methodology
- Cluster analysis methodology
- Generations
- Abbreviations and terms

Market tables and definitions

- Market definition for total market perspective
- Market size methodology
- Forecast
- Forecast fan chart
- Fan chart table for total market

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