

HAIR OILS – INDIAN CONSUMER – 2020

With trendier formats entering the category, hair oil players must make aggressive moves to defend their turf.



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Report Content

- What you need to know

EXECUTIVE SUMMARY

- The future of hair oils in the Indian market
- India must lead in the category... not follow
 - Graph 1: Hair oil launches across markets, 2017-19
- Because the consumer demands innovation
- What we know of the Indian hair oil user

Time to segment needs and consumers

- Basic and common needs, but holds the majority
- The majority is still a worthy pursuit
- Win back the metro-dwelling users
- Win back the metro hair oil user
- Serve the evolving needs of men
- Cannabalise or be cannabalised

KEY TRENDS

- What you need to know

An unmatched product in the market

- Hair oils: A vigorous and dominating product in haircare
- Foundational expectations of hair oils persist
- Matched only by strong, consistent demand
- Hair oils are used to tackle basic hair concerns
- Hair oils are used to tackle basic hair concerns
 - Graph 2: Top five reasons for using hair oils, Dec 2019

City life shuns hair oils

- Hair oil usage has declined with metro-dwelling consumers
- Consumer demand for light hair oils
- Marico's Hair & Care Range
- Modern lifestyle has led to innovation in the category

Heading towards premiumisation

- Rise of local indie brands

KEY DRIVERS

- Hair serums are cannibalising hair oils
- Time and effort are conversation starters with young consumers
- Economic slowdown has resulted in premiumisation
- Men's grooming is seeing fast growth

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN INDIA

- Small pack sizes are affordable and can increase usage
- Stress levels increase for consumers
- Cooling oils cater to seasonal demand
- Communication is also further extended to position cooling oils as de-stressors
- Scalp health is the need of the hour with rising environmental aggressors
- Look to Brazil for hair inspiration, appeal and expertise

CONSUMER INSIGHT

- What you need to know
- Hair oil usage is fragmented and diverse
 - Graph 3: Hair oil usage across women, Dec 2019
 - Graph 4: Hair oil usage across men, Dec 2019
- The ubiquity of usage is both the problem and the opportunity
- Profile data
- Profile data
- Who is the hair oil consumer
- Metro vs low-tier consumer
- Usage differs significantly between men and women
- Region-wise hair oil usage
 - Graph 5: Types of hair oil used across regions, Dec 2019
- Hair oil usage is heavily dependent on the crop cultivation in each region

The common hair oil user

- Who is the common hair oil user?
- Women, especially younger, prefer the overnight oiling ritual
 - Graph 6: Reasons for using hair oil, Dec 2019

- Hair oiling is an everyday regime for the 55+ low-tier consumer

The metro-dwelling hair oil user

- Who is the metro-dwelling hair oil user?
- Gen Zs need sensory satisfaction to wear hair oils out of the home
- The younger Millennial uses hair oils as a de-stressor
- Saving time and effort increase pre-hair wash oil routine

The male hair oil upgrader

- Who is the male hair oil upgrader?
- The working man uses hair oils everyday
- Gen Z men use hair oils as a preventive measure

There are more upgraders, too

- The social media-savvy younger cohort is open to an ingredient upgrade
 - Graph 7: Bhringraj hair oil usage across age groups in female hair oil users, Dec 2019
- Upgrade the traditional hair oil category for the older cohort
 - Graph 8: Types of hair oil usage among age groups, Dec 2019
- Millennial women seek protection from environmental aggressors

MARKET APPLICATIONS

- Opportunities: Key focus area

Efficacy and size will drive usage

- Make overnight hair oil treatment part of the daily routine by providing ultimate repair
- Extend the concept of 'mini' to ensure on-the-go convenience for low-tier consumers
- Small pack sizes can also drive more trial in the East

Increase usage with metro-dwelling consumers

- Fragrance can impact the post-hair wash regime
- Offer a holistic approach to relaxation for the stressed consumer
- Global haircare brands are giving consumers 'beauty sleep'
- In-shower solutions will drive pre-hair wash oil usage

Cannibalise other categories

- Cannibalise styling solutions
- Quickly tap into the growth of men's hair oils for styling
 - Graph 9: Male hair styling & treatments launches by formats, 2018-19
- Beardo Hair Serum
- Natural oils can cross over from skincare to haircare

- What next after bhringraj oil?
- Extend skincare to scalp care
- The Millennial consumer is looking for additional protection from environmental aggressors

Who's innovating

- Extending hair oil for scalp health
- Create a "super oil" which tackles multiple hair concerns
- Innovative packaging to amplify tradition and culture

Global Innovations

- Rinse-off hair sheet masks
- Use communication to drive occasion-based use

APPENDIX

- Consumer survey methodology

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