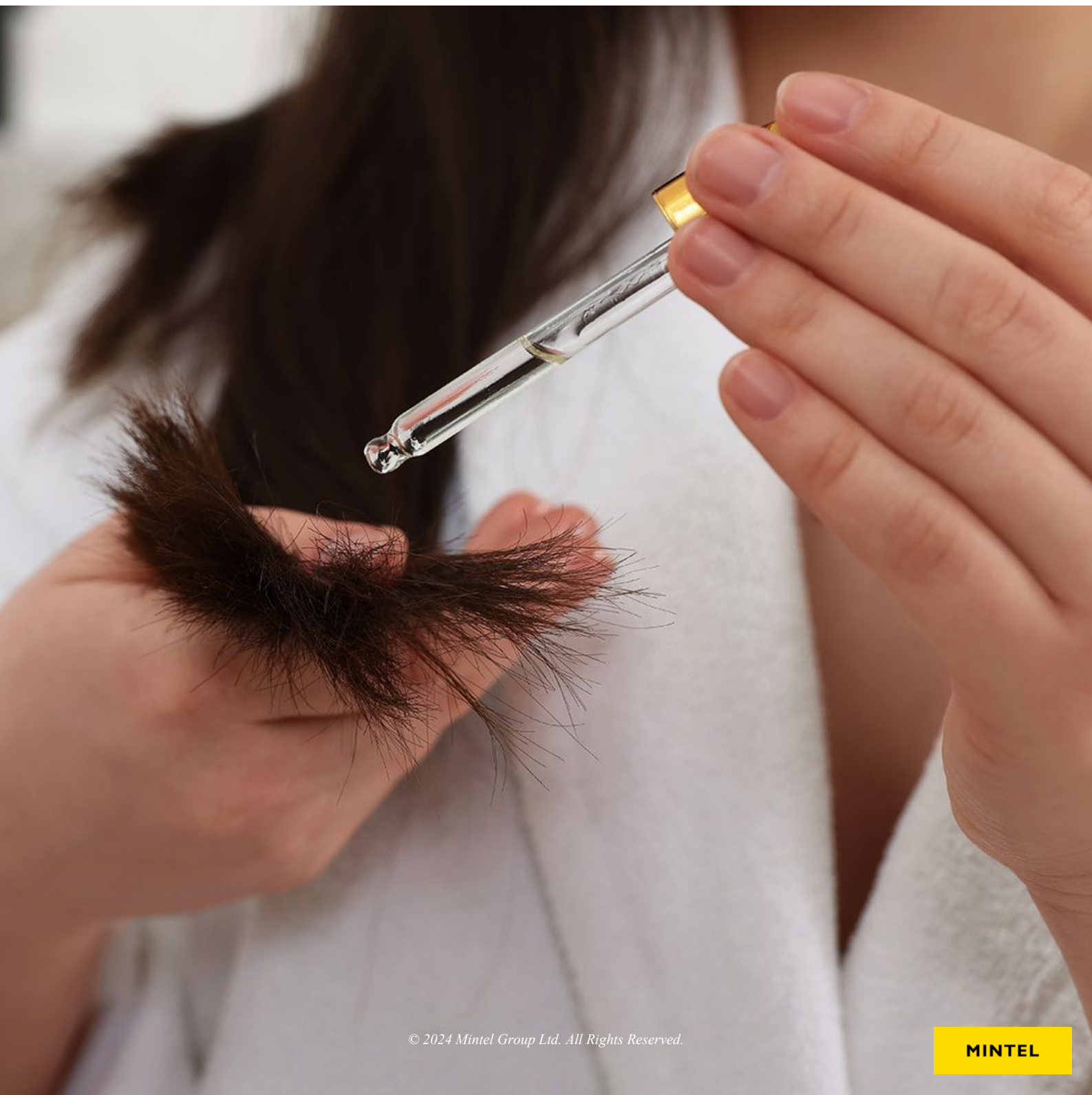


HAIRCARE – INDIAN CONSUMER – 2023

Premiumise haircare for diverse Indian hair types by dialing up on nourishment and care. Focus on functionality to promote the usage of leave-in treatments.



Twinkle Behl, Research Analyst – Beauty and Personal Care, India



Haircare – Indian Consumer – 2023

This report looks at the following areas:

- Key trends seen in the haircare category in India
- Understanding the usage of haircare products
- Understanding diverse Indian hair types
- Identifying key hair concerns faced by consumers with diverse hair types
- Opportunities to premiumise consumers with diverse hair types
- Opportunities to upgrade consumers to new haircare formats



Premiumise haircare for diverse Indian hair types by dialing up on nourishment and care. Focus on functionality to promote the usage of leave-in treatments.

Overview

Launches in the haircare category are stagnating in India. However, there is potential for reviving innovation as Indian consumers are embracing haircare routines, new haircare formats and diverse hair types.

Traditionally, straight hair has been considered the ideal hair type for Indian women, which is why a majority of consumers claim to have straight hair. However, **8%** identify their hair type as wavy and **16%** as curly. Those with wavy and curly hair exhibit a preference for specialised haircare products designed for their specific needs, indicating an opportunity for premiumisation through products tailored to their unique hair types.

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There is potential for enhancing usage of new haircare formats (eg serum, essence) with consumers who already use them. Brands can enhance their functionality and play up on key features such as convenience and fragrance to increase usage.

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Report Content



EXECUTIVE SUMMARY

- Mintel's perspective

Key issues covered in this Report

- Overview
- The outlook for the haircare category in India
- Cater to the specialised needs of Wavy Hair Consumers by dialing up on nourishment
- Expand the product repertoire of Curly Hair Consumers by focusing on moisturising benefits
- Increase usage of leave-in treatments by driving up on functionality

KEY TRENDS AND MARKET FACTORS

- What you need to know

Shifting haircare focus demands new innovation

- India ranks within the top 10 countries globally in terms of haircare product launches
 - Graph 1: haircare* launches by top 10 markets, 2018-23
- While shampoo maintains its dominance, all sub-categories are experiencing a launch standstill
 - Graph 2: hair launches, by sub-category, 2018-2023
- Enhanced focus on haircare
- Brightening claims reign in haircare
 - Graph 3: haircare* launches, by beauty enhancing claims, 2018-2023
- Indian brands are revamping their haircare range with innovative claims

Embracing diverse Indian hair types

- Indian consumers' obsession over straight hair
- Indian haircare brands boosting the fascination with straight hair
- Straight hair still remains a coveted and popular search topic
- Western countries show acceptance towards diverse hair types
- Curly hair movement gains momentum in India
- Indian haircare brands today are promoting an understanding of diverse hair types
- Homegrown brands expand their offerings to include products for curly hair

Hair treatments see a revolution

- Shampoo and oil products continue to hold the highest significance
- India leads in hair oil launches

- Graph 4: top five markets, by % of hair oil* launches, 2018-23
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 - Graph 5: hair treatment product launches, by leave-in claim, 2018-23
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- Homegrown brands are now honing in on hair concerns with serums

WHAT CONSUMERS WANT AND WHY

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 - Graph 6: hair concerns faced by Indian consumers in the past six months, 2023
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 - Graph 7: haircare* launches by beauty-enhancing claims, 2018-23
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 - Graph 8: usage of haircare products in the past six months, 2023
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 - Graph 9: consumers by hair type, 2023
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- Low NPD in India indicates an opportunity to capitalise on wavy hair
 - Graph 12: shampoo and conditioner launches for wavy* hair, 2018-23
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- Enhance usage with haircare that tackles hair thinning
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Haircare – Indian Consumer – 2023

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- Social data research methodology
- TURF Analysis

About Mintel India Consumer

Access our reports now and we'll tell you how major trends are affecting India. We also hone in on the regional differences from socio-economic groups to demographics such as age, gender and household composition. We research consumers in Metro and Tier 1 to 3 cities across the 4 main regions and in 6 local languages.

In each report, we're analysing the trends and the innovations, the behaviours and the influencers of consumers across India. Our local expert analysts then examining the primary research and consumer data and translating it into what it means for you.

- ✔ Find out what Indian consumers want, what they need and what influences their purchasing decisions.
- ✔ Understand the Indian market and see how it fits into wider trends on a local and global level.
- ✔ Take advantage of the gaps and opportunities that exist today, tomorrow and beyond.

How Mintel Indian Consumer will help your business grow:

01

Segment consumers across India according to their regional and demographic differences so you can target them more effectively.

02

Analyse the latest trends and innovations and see how they fit at a local level to identify opportunities for your next big idea.

03

See action-oriented summaries to understand an area quickly or investigate the data to get an in-depth understanding of your market.

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