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.

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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

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.

There is potential for enhancing usage of new haircare formats (e.g., 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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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: haircare launches, by sub-category, 2018-2023
• Enhanced focus on haircare
  - Graph 3: haircare launches, by beauty enhancing claims, 2018-2023

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

Hair treatments see a revolution

• India leads in hair oil launches
  - Graph 4: top five markets, by % of hair oil launches, 2018-23
  - Graph 5: hair treatment product launches, by leave-in claim, 2018-23
• Serum format gains ground in India, with a focus on hair shine
WHAT CONSUMERS WANT AND WHY

• What you need to know
  • Hair loss is a prominent concern among Indian consumers
    - Graph 6: hair concerns faced by Indian consumers in the past six months, 2023
    - Graph 7: haircare launches by beauty-enhancing claims, 2018-23
  • Drive more comprehensive anti-hairloss routines
  • Traditional products continue to reign supreme
    - Graph 8: usage of haircare products in the past six months, 2023
    - Graph 9: consumers by hair type, 2023
    - Graph 10: hair type, by region, 2023

Target Wavy Hair Consumers with haircare that offer specialised nourishment

• Who are the consumers with wavy hair?
  - Graph 11: attitude towards haircare products, 2023
  - Graph 12: shampoo and conditioner launches for wavy hair, 2018-23
• Offer a haircare series specially curated for wavy hair
• Allow technology to take the lead in addressing the needs of wavy haircare
  - Graph 13: hair concerns, by hair type, 2023
• Provide anti-hairloss treatment for wavy hair
• Enhance usage with haircare that tackles hair thinning
• Elevate scalp care to include scalp scaling for wavy hair
  - Graph 14: consumers with wavy hair using shampoo, conditioner and hair oil more, 2023
• Respond to the nourishment demands of wavy hair
  - Graph 15: willingness to pay more for scientific ingredients in haircare, 2023
• Opportunity to tap into the trend of functional skincare ingredients for nourishment
  - Graph 16: shampoo, conditioner and hair treatment launches with select ingredients, 2018-23
• Call out an array of nourishing hero ingredients
• Deliver nourishment to wavy hair with biotin

Curly hair consumers seek hydration

• Who are the consumers with curly hair?
  - Graph 17: willingness to pay more for haircare for specific hair type, 2023
• Case study: meeting the unique needs of Indian curly hair
  - Graph 18: willingness to pay more for haircare products that can solve specific hair concerns, 2023
• TURF Analysis – factors willing to pay more for in haircare products
  - Graph 19: conditioner usage among consumers, 2023
  - Graph 20: shampoo and conditioner launches for curly hair, by moisturising claim, 2018-2023
• Emphasise the importance of hydration when it comes to tackling hair concerns
  - Graph 21: willingness to pay more for haircare products, 2023
• Address hair concerns in hair styling products

Highlight the functionality of leave-in treatments
• Who are Evolved Haircare Users?
  - Graph 22: more usage of haircare products in the past six months, 2023
• Make convenience the defining feature in the differentiation of hair oils and serums
• Opportunity to capitalise on treatment formats beyond hair oils
  - Graph 23: hair treatment launches by formats and textures, 2018-23
• Offer leave-in treatments beyond serum format
  - Graph 24: top three hair concerns, 2023
• Offer products that address thin hair by providing volume
  - Graph 25: attitude towards leave-in treatments (eg conditioner, serum), 2023
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  - Graph 26: hair treatment launches, by damaged hair claim, 2018-2023
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  - Graph 27: attitude towards unique fragrances in haircare, 2023
• Hair treatments over-fixate on green/herbal/woody fragrances
  - Graph 28: hair treatments product launches, by top five fragrance groups, 2018-23
• Innovate with unique fragrances

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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.

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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.

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02
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