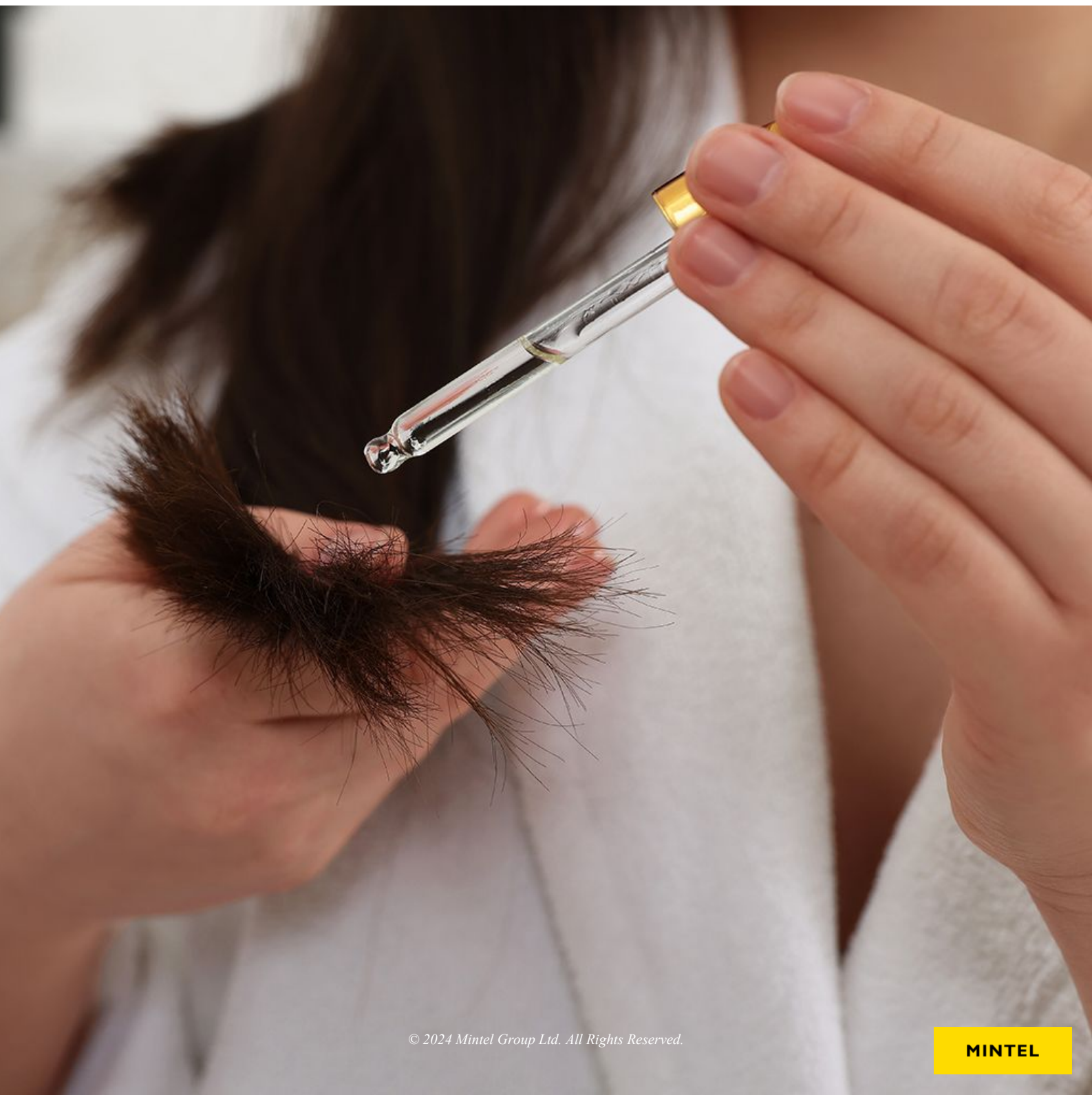


HAIRCARE – INDIAN CONSUMER – 2023

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.

BUY THIS REPORT NOW


€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL



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.

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

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
- Leave-in claims in haircare gain traction in APAC countries
 - Graph 5: hair treatment product launches, by leave-in claim, 2018-23
- Serum format gains ground in India, with a focus on hair shine
- Homegrown brands are now honing in on hair concerns with serums

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
- Capitalise on anti-hair loss claims
 - 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
- Indian consumers believe their hair type to be straight
 - Graph 9: consumers by hair type, 2023
- Consumers in South, East and West are displaying an increased awareness of their unique hair characteristics
 - Graph 10: hair type, by region, 2023
- Understanding consumers with different hair types

Target Wavy Hair Consumers with haircare that offer specialised nourishment

- Who are the consumers with wavy hair?
- Consumers with wavy hair seek specialised haircare
 - Graph 11: attitude towards haircare products, 2023
- Low NPD in India indicates an opportunity to capitalise on wavy hair
 - Graph 12: shampoo and conditioner launches for wavy* hair, 2018-23
- Offer a haircare series specially curated for wavy hair
- Draw attention to the disparities in hair attributes when comparing straight and wavy hair
- Allow technology to take the lead in addressing the needs of wavy haircare
- Take note of the top three hair concerns among consumers with wavy hair
 - 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
- Enhanced usage of haircare products underscores quest for nourished hair
 - Graph 14: consumers with wavy hair using shampoo, conditioner and hair oil more, 2023
- Respond to the nourishment demands of wavy hair

Haircare – Indian Consumer – 2023

- Incorporate scientific ingredients for enhanced nourishment
 - 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?
- Opportunity to premiumise by catering to specific hair type
 - Graph 17: willingness to pay more for haircare for specific hair type, 2023
- Make curly haircare products available to consumers
- Case study: meeting the unique needs of Indian curly hair
- Attend to the increasing array of hair issues faced by consumers with curly hair
 - Graph 18: willingness to pay more for haircare products that can solve specific hair concerns, 2023
- Reach more consumers by offering natural haircare products that can solve specific hair concerns
- TURF Analysis – factors willing to pay more for in haircare products
- Curly hair consumers favour conditioners to tame their frizz
 - Graph 19: conditioner usage among consumers, 2023
- Opportunity to capitalise on moisturising claim for curly hair
 - 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
- Introduce co-washing concept for hydration
- Guide Curly Hair Consumers to new products for effective hair maintenance
 - Graph 21: willingness to pay more for haircare products, 2023
- Emphasise importance of hair styling products for curly hair
- Address hair concerns in hair styling products

Highlight the functionality of leave-in treatments

- Who are Evolved Haircare Users?
- Leave-in treatments show potential to out-do hair oils
 - 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
- Aspiration for thicker and more voluminous hair
 - Graph 24: top three hair concerns, 2023
- Offer products that address thin hair by providing volume

Haircare – Indian Consumer – 2023

- Make leave-in treatments the champions of caring for damaged hair
 - Graph 25: attitude towards leave-in treatments (eg conditioners, serum), 2023
- Innovate hair treatments with a focus on damaged hair claims
 - Graph 26: hair treatment launches, by damaged hair claim, 2018-2023
- Advocate leave-in treatments for damaged hair concerns
- Transition to bond repair technology for addressing damaged hair concerns
- Include unique, exotic fragrances to make it stand out from hair oils
 - 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

APPENDIX

- Consumer survey methodology
- 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.

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by an Indian licensed market survey agent ([See Research Methodology for more information](#)).

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850