

Black Haircare - US - August 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The Black haircare market has evolved into regimen maintenance and styling, with chemical product use concentrated among the few who will always be customers. Having chemical-free hair is no longer the big story, but rather how Black consumers' beliefs and perceptions of their hair impacts their personal maintenance, style choices and product selection."

- **Toya Mitchell, Multicultural Analyst**

This report looks at the following areas:

- **Market growth driven by regimen-focused products**
- **Protective styles will be the next big thing**
- **Moderate at-home haircare skills yield expected (but not fully satisfying) results**

The 2019 Black haircare regimen market is estimated at \$1.75 billion, which is a modest 2.1% increase from the \$1.71 billion in 2018. By 2024, regimen sales will reach nearly \$2 billion dollars, an 11% increase from 2019. The Black haircare market is now defined by regimen-focused products including shampoo, conditioners and styling products, which reflects consumer behavior and style choices. Relaxers are fading into obscurity among a dwindling consumer base while hair color use will remain a constant for their evergreen target consumer.

Black-targeted brand spending continues to grow; however, consumers prefer and will only buy brands with product formulas specifically made for them in mind. Heritage brands are falling behind as start-up brands nudge their way into the big leagues.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Black Haircare - US - August 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

Overview

The Black haircare market poised to grow to \$2 billion on regimen alone

Regimen product overview

Figure 1: Estimated total expenditures and forecast, by Black consumers, by regimen segment, at current prices, 2014-24

Key takeaways

1. Market growth driven by regimen-focused products
2. Protective styles will be the next big thing
3. Moderate at-home haircare skills yield expected (but not fully satisfying) results

The issues and opportunities

Product collection use focused on conditioners and styling products

Figure 2: Multi-outlet sales of Black haircare regimen products, by leading haircare companies, rolling 52 weeks 2018 and 2019

Natural hair is the norm, but protective styles evolve as a preferred style

Figure 3: Hairstyles worn within the last year – females, by relaxed and protective styles, 2016-19

Alternative, natural products are complicated to use

Figure 4: Alternative haircare product use, June 2019

Products work as expected because they are formulated just for them

Figure 5: Haircare brand preferences, June 2019

There is a gap between skill and confidence in their looks

Figure 6: Haircare skills and perceptions of Hairstyles, June 2019

What it means

The Market – What You Need to Know

Black consumers account for one out of five total haircare dollars spent

Modest spending growth expected within regimen sales

Haircare brand looks to impact policy

Mainstream companies and retailers look to Black consumers to drive growth

Market Size and Forecast

Regimen focused collections drive the Black haircare market

Figure 7: Expenditures and fan chart forecast expenditures by Black consumers for shampoo, conditioner, and styling products, at current prices, 2014-24

Figure 8: Historical and forecast expenditures by Black consumers for shampoo, conditioner, and styling products, at current prices, 2014-24

Black consumer regimen sales equal one fifth of the general market

Figure 9: regimen haircare expenditure estimate share by category, total and Black, 2018

Market Breakdown

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Black Haircare - US - August 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Haircare regimen sales grow at a steady pace

Figure 10: Expenditures by Black consumers on haircare regimen products, by segment, at current prices, 2017-19

Shampoo forecast reflects steady use of product collections

Figure 11: Estimated and fan chart forecast expenditures by Black consumers for shampoo, at current prices, 2014-24

Conditioner sales reflect treatment and styling use

Figure 12: Estimated and fan chart forecast expenditures by Black consumers for conditioners, at current prices, 2014-24

Figure 13: Cantu shea butter hair mask, 2019

Styling forecast mixed – signals cannibalization from conditioners

Figure 14: Estimated and fan chart forecast expenditures by Black consumers for styling products, at current prices, 2014-24

Hair color will have a market so long as consumers cover gray

Figure 15: Estimated and fan chart forecast expenditures by Black consumers for hair color, at current prices, 2014-24

Relaxers sales continue to plummet to niche status

Figure 16: Estimated and fan chart forecast expenditures by Black consumers for relaxers, at current prices, 2014-24

Market Perspective

Dove, politicians join forces to ban discrimination of natural hair

Figure 17: Dove Crown Act twitter advertising with influencer Ty Alexander, July 2019

Market Factors

Mainstream companies double down on Black haircare market with acquisitions and new products

Figure 18: Suave Naturals Twitter Advertising, May-June 2019

Figure 19: Head and Shoulders Royal Oils video, January-February 2019

Figure 20: Sally's Beauty Supply/P&G My Black is Beautiful Facebook and online advertising, June 2019

Key Players – What You Need to Know

Consumer spending on anchor products grow

Shea Moisture retains 19% of consumer spending in the category

Cantu eclipses L'Oréal's second place spot

All texture brands create a space and market for Black consumers

Alternative ingredients on brands' and retailers' radar

Increased prevalence of protective styles prompts product innovation

Black Haircare Company Manufacturer Sales

Anchor conditioner and styling products continue to grow

Figure 21: Multi-outlet sales of Black haircare regimen products, by leading black haircare companies, rolling 52 weeks 2018 and 2019

At-home chemical haircare products fall as expected

Figure 22: Multi-outlet sales of Black haircare relaxers and hair color, by leading black haircare companies, rolling 52 weeks 2018 and 2019

Shea Moisture is the clear sales leader, Cantu moves up to second place

Figure 23: Multi-outlet sales of Black haircare products, by leading Black haircare companies, Rolling 52 weeks 2018 and 2019

Figure 24: SheaMoisture/Target Bamboo Charcoal collection, online banner ad, February 2019

Figure 25: SheaMoisture Raw Shea Butter Facebook ad, March 2019

Cantu product efficacy pays off in shampoo category

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Black Haircare - US - August 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 26: Multi-outlet sales of shampoo, by leading Black haircare companies and brands, rolling 52 weeks 2018 and 2019

Spending on natural and traditional brands yield mixed results

Figure 27: Multi-outlet sales of conditioner, by leading Black haircare companies and brands, rolling 52 weeks 2018 and 2019

Figure 28: Jamaican Mango & Lime advertising, January – February 2019

Cantu maintains styling category lead while new brand moves up to the big leagues

Figure 29: Multi-outlet sales of styling products, by leading Black haircare companies and brands, rolling 52 weeks 2018 and 2019

All relaxer brands experience sales declines

Figure 30: Multi-outlet sales of relaxer products, by leading Black haircare companies and brands, rolling 52 weeks 2018 and 2019

Covering gray hair remains popular – for now

Figure 31: Multi-outlet sales of hair color products, by leading Black haircare companies and brands, rolling 52 weeks 2018 and 2019

What's Working?

Brands move toward inclusive product offerings for all textures

Figure 32: Multi-outlet sales of select all texture haircare products, by companies and brands, rolling 52 weeks 2018 and 2019

Figure 33: Maui Moisture video ad, May 2019

Black haircare influencers impact consumer behavior

Figure 34: Cantu instructional video, "My Long Lasting Twist-Out", 2019

Figure 35: Cantu instructional video, "My Bomb Blowout", 2019

What's Struggling?

Traditional brands can't shake off their relaxer heritage

What's Next?

Retailers and brands offer natural product alternatives

Figure 36: Cantu Apple Cider Vinegar and Tea Tree Shampoo, February 2019

Figure 37: Revlon/Colomer – Creme of Nature Clay and Charcoal Facebook Advertising, July 2019

Figure 38: Aztec Secret Indian Healing Clay in Target beauty section, March 2019

New product launches address natural haircare underneath protective styles

Figure 39: Hairstyles worn within the last year – females, by relaxed and protective styles, 2016-19

Figure 40: Girl+ Hair Introductory video to Under Hair Care, 2019

Figure 41: PDC Brands' Cantu Apple Cider Vinegar Root Rinse, December 2018

The Consumer – What You Need to Know

Hairstyle preferences cause shift in consumer segments

Natural, textured style wearers have greater flexibility in their choices

Alternative ingredient product use in nascent stage

Black-targeted haircare products are preferred to ensure efficacy

Most Black consumers can maintain their hair, but believe that they look presentable, not great

Black Haircare Segments

Growing importance of protective styles impact female segments

Figure 42: Black female haircare segmentation, June 2019

Natural Nina represents a small segment of natural women

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Black Haircare - US - August 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 43: Demographic profile of Natural Nina haircare segment, June 2019

Trendy Tonya's preference for protective styles is becoming the norm

Figure 44: Demographic profile of Trendy Tonya haircare segment, June 2019

As Relaxed Regina ages, she prefers what's familiar

Figure 45: Demographic profile of Relaxed Regina haircare segment, June 2019

Image is everything for Adventurous Ashley

Figure 46: Demographic profile of Adventurous Ashley haircare segment, June 2019

Men prefer simple, yet groomed styles

Figure 47: Black male haircare segmentation, June 2019

Handsome Henry stays groomed from head to toe

Figure 48: Demographic profile of Handsome Henry haircare segment, June 2019

Stylish Steve wears varied styles just like his peers

Figure 49: Demographic profile of Stylish Steve haircare segment, June 2019

Classic Carl's grooming extends only to natural products

Figure 50: Demographic profile of Classic Carl haircare segment, June 2019

Hair Texture

Hair type helps Black women navigate the category

Figure 51: Hair texture – females, June 2019

Men are not as hair engaged as women

Figure 52: Hair texture – males, June 2019

Hairstyles Worn

Natural is the standard, but styles within can vary

Figure 53: Hairstyles worn within the last three years, June 2019

Women stick to the same look, but will experiment with protective styles

Figure 54: Hairstyles worn within the last three years – females, by last time worn, June 2019

Young women more likely to alternate between natural and protective styles

Figure 55: Hairstyles worn in the past three years, by female haircare segments, June 2019

A simple low-cut fade is the style of choice for most men

Figure 56: Hairstyles worn in the past three years, by male haircare segments, June 2019

Alternative Haircare Product Usage

Consumers looking for magic in the bottle turn to alternative products

Figure 57: Alternative haircare product use, June 2019

Protective styles require the most maintenance

Figure 58: Alternative haircare product use – females, by select hairstyles worn, June 2019

Multi-functional natural products limited by difficulty in use

Figure 59: Alternative haircare product use – females, by count of product types, June 2019

Men keep it simple and stick to formulated products

Figure 60: Alternative haircare product use – males, June 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Black Haircare - US - August 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Haircare Brand Preferences

Black consumers trust and use products made specifically for them

Figure 61: Haircare brand preferences, June 2019

Figure 62: Black haircare price points, 2014-19

Product function is universal, but quality and performance tied to outcomes

Figure 63: Haircare brand preferences, by female haircare segments, June 2019

Engaged men trust that products will work with little regard to brands

Figure 64: Haircare brand preferences, by male haircare segments, June 2019

Haircare Skills and Experimentation

Most women can create a presentable hairstyle on their own

Figure 65: Haircare skills and experimentation frequency – females, June 2019

Women stick to a familiar process, even if highly skilled

Figure 66: Experimentation frequency – females, by haircare skills, 2019

Most men wear a low-maintenance style that requires basic skills

Figure 67: Haircare skills and experimentation frequency – males, June 2019

Perceptions of Hairstyles

Some look their best most of the time...others look presentable

Figure 68: Perceptions of hairstyles, June 2019

As women abandon relaxers, some remain self-conscious

Figure 69: Perceptions of hairstyles – females, by select hairstyles worn, June 2019

Men with styled natural hair like the look, but express some self-doubt

Figure 70: Perceptions on hairstyles – males, by select hairstyles worn, June 2019

Confidence tied to skill level and self-perception

Figure 71: Perceptions of hairstyles, by female haircare segments, June 2019

In their own words

Figure 72: Personal hair styling "must have" products and tools, May 2019

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Fan chart forecast

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Terms

Appendix – The Market

Figure 73: Expenditures by Black consumers for shampoo, conditioner, and styling products, at current prices, 2014-24

Figure 74: Expenditures by Black consumers for shampoo, conditioner, and styling products, at inflation-adjusted prices, 2014-24

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Black Haircare - US - August 2019

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 75: Expenditures by Black consumers for shampoo, conditioner, and styling products, by segment, at current prices, 2014-24

Figure 76: Expenditures by Black consumers for haircare products, by segment, at current prices, 2017 and 2019

Figure 77: Expenditures by Black consumers on shampoo, at current prices, 2014-24

Figure 78: Expenditures by Black consumers on shampoo, at inflation-adjusted prices, 2014-24

Figure 79: Expenditures by Black consumers on conditioner, at current prices, 2014-24

Figure 80: Expenditures by Black consumers on conditioner, at inflation-adjusted prices, 2014-24

Figure 81: Expenditures by Black consumers on styling products, at current prices, 2014-24

Figure 82: Expenditures by Black consumers on styling products, at inflation-adjusted prices, 2014-24

Figure 83: Expenditures of Black consumers on hair color, at current prices, 2014-24

Figure 84: Expenditures of Black consumers on hair color, at inflation-adjusted prices, 2014-24

Figure 85: Expenditures by Black consumers on relaxers, at current prices, 2014-24

Figure 86: Expenditures by Black consumers on relaxers, at inflation-adjusted prices, 2014-24

Appendix – Key Players

Figure 87: Multi-outlet sales of Black haircare products, by leading haircare companies, rolling 52 weeks 2018 and 2019

Figure 88: Multi-outlet sales of shampoo, by leading haircare companies, rolling 52 weeks 2018 and 2019

Figure 89: Multi-outlet sales of conditioner by leading haircare companies, rolling 52 weeks 2018 and 2019

Figure 90: Multi-outlet sales of styling products by leading haircare companies, rolling 52 weeks 2018 and 2019

Figure 91: Multi-outlet sales of relaxers products by leading haircare companies, rolling 52 weeks 2018 and 2019

Figure 92: Multi-outlet sales of hair color products by leading haircare companies, rolling 52 weeks 2018 and 2019

Figure 93: Multi-outlet sales of select all texture haircare products, by companies and brands, rolling 52 weeks 2018 and 2019

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com