



Black Haircare: Incl Impact of COVID-19 - US - August 2020

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- The impact of COVID-19 on Black consumer behavior and the haircare market.
- Why Black consumers' economic status will rebound later than most workers.
- Expectations for Black consumer spending during re-emergence and recovery.
- Black consumer product preferences, performance expectations and who influences them to buy.

Hair is important to Black consumers. It is the foundation to their style, identity and how they choose to present themselves when out in the world. Black consumers are internally driven in shaping their unique style, but they also look to influencers to solidify their haircare, from product choices to maintenance methods. Brands are following the consumers' lead in creating new solutions that address their primary haircare goal – hair health. Chasing hair health as a goal, plus the expectation to achieve the best style possible at home, will prove that this target will remain a solid consumer with some spending adjustments amidst lifestyle changes due to COVID-19 and an unprecedented economic recession.



“A majority of Black consumers say that their priorities about their appearance have not changed during the pandemic, which gives insight into their regard for personal style. Hair is foundational to Black consumers' looks, so they will continue to buy haircare products during lean economic times.”

– **Toya Mitchell, Senior Multicultural Analyst**

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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
- Key issues covered in this Report
- Definition
- COVID-19: US context
- Economic and other assumptions

EXECUTIVE SUMMARY

- Top takeaways
- Market overview

Figure 1: Black consumer spending and forecast on regimen haircare products, at current prices, 2015-25
- Impact of COVID-19 on Black haircare

Figure 2: Short-, medium- and long-term impact of COVID-19 on Black haircare, August 2020
- Opportunities and challenges
- Companies will offer promotions to keep consumers in the brand, but will need to extend other benefits and tangibles
- People with low or moderate skills who improve during lockdown serve as a prime permanent convert
- Value-priced brands should push brand benefits and efficacy vs competitors
- Understand Black consumers' varying approaches to haircare to develop messaging, product mix for targeted appeal

Figure 3: Black female haircare segmentation, April 2020
- Category and consumer insights and implications
- Recommend multiple product options to match consumer hairstyle flexibility

Figure 4: Hairstyles worn in the past three years – women, by current hairstyle, April 2020
- Ensure influencer strategy focused on stylists' recommendations is prominent in communications

Figure 5: Influencers on haircare maintenance and style, April 2020
- Emphasize hair health with specific product benefits to drive sales

Figure 6: Expectations from haircare products, April 2020
- Focus on "clean" haircare product benefits and ingredients over services

Figure 7: Haircare trends of interest, April 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

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

THE MARKET – KEY TAKEAWAYS

- **Haircare regimen estimated spending expected to be flat 2020-21**
- **Styling segment drives greatest share of regimen spending, but forecast to fall through 2025**
- **Volatile economic situation impacts Black consumers who remain in the category**

MARKET SIZE AND FORECAST

- **Regimen haircare spending will fall slightly as volume remains flat**
Figure 8: Black consumer spending and forecast on regimen haircare products, at current prices, 2015-25
Figure 9: Black consumer spending and forecast on regimen haircare products – table, at current prices, 2015-25
- **Macroeconomic data**
Figure 10: Key drivers affecting Mintel's market forecast, 2019-25 (Updated July 31, 2020)
- **Impact of COVID-19 on Black haircare**
Figure 11: Short-, medium- and long-term impact of COVID-19 on Black haircare, August 2020
- **Lockdown**
Figure 12: Black consumers' lifestyle and consumption priority change – appearance, April-August 2020
- **Re-emergence**
- **Recovery**
- **COVID-19: US context**
- **Learnings from the last recession**

SEGMENT PERFORMANCE – BLACK CONSUMER SPENDING

- **Product use driven by increasing focus on conditioner**
Figure 13: Black consumer share of spending on regimen haircare products, by segment, at current prices, 2018 and 2020
Figure 14: Black consumer spending on regimen haircare products – table, by segment, at current prices 2018 and 2020
- **Shampoo sales will grow as consumers continue to buy for hair health plus cleansing**
Figure 15: Black consumer spending and forecast on shampoo, at current prices, 2015-25
Figure 16: Black consumer spending and forecast on shampoo – table, at current prices, 2015-25

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

- Protective as well as natural styles will drive up conditioner and treatment use**

Figure 17: Black consumer spending and forecast on conditioners, at current prices, 2015-25

Figure 18: Black consumer spending and forecast on conditioners – table, at current prices, 2015-25

- Styling products are used every day, but smaller dosage may result in less frequent purchases**

Figure 19: Black consumer spending and forecast on styling products, at current prices, 2015-25

Figure 20: Black consumer spending and forecast on styling products – table, at current prices, 2015-25

- Relaxer sales continue to fall, but share declines expected to lessen**

Figure 21: Black consumer spending and forecast on relaxers, at current prices, 2015-25

Figure 22: Black consumer spending and forecast on relaxers – table, at current prices, at current prices, 2015-25

- Hair color sales surge due to lockdown may be temporary**

Figure 23: Black consumer spending and forecast on hair color, at current prices, 2015-25

Figure 24: Black consumer spending and forecast on hair color – table, at current prices, at current prices, 2015-25

MARKET FACTORS

- Crown Act passes in select states, but discrimination persists in institutions**

Figure 25: The Crown Act Instagram “save the date” announcement, June 2020

- Temporary drop in unemployment and reduced financial relief show mixed economic reality**

Figure 26: Monthly total and Black labor force participation and unemployment rates, January 2010–August 2020

MARKET OPPORTUNITIES

- Provide virtual hair/scalp consultations for challenged consumers**

- Showcase multifunctional uses for styling products to increase frequency and purchase**

BLACK CONSUMER TARGETED COMPANIES AND BRANDS – KEY TAKEAWAYS

- Greater product choice on the store and digital shelf lifts all Black-targeted spending**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

- **Spending growth, but little share change across brands between 2019-20**
- **Independent company acquisition and incubator strategies drive continued mainstream sales**

BLACK CONSUMER TARGETED HAIRCARE SALES AND SHARES

- **New product launches and increased distribution drive sales increases**
Figure 27: Multi-outlet sales of Black haircare regimen products by Black haircare companies, rolling 52 weeks 2019 and 2020
- **Hair color sales grow even amidst a desire for natural ingredients**
Figure 28: Multi-outlet sales of Black haircare relaxers and hair color, by Black haircare companies, rolling 52 weeks 2019 and 2020
- **SheaMoisture remains the category leader; mid-size brands show greatest gains**
Figure 29: SheaMoisture Facebook Advertising, 2019-20
Figure 30: Multi-outlet sales of Black haircare products, by leading Black haircare companies, rolling 52 weeks 2019 and 2020
- **Mid-priced consumer favorites capture share from shampoo segment leader**
Figure 31: PDC Brands/Cantu avocado haircare products, 2020
Figure 32: Multi-outlet sales of shampoo, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020
- **Growing desire for healthy hair drives conditioner and treatment sales increase**
Figure 33: Multi-outlet sales of conditioner, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020
- **Styling favorites see sales and share growth**
Figure 34: Multi-outlet sales of styling products, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020
- **Relaxer category consolidation drives change by brand and product lines**
Figure 35: Multi-outlet sales of relaxers, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

- **Consumers covering gray on their own at home drive hair color sales**

Figure 36: Multi-outlet sales of hair color, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020

BRAND STRATEGIES AND PRODUCT INNOVATION

- **Black independent brand acquisition extends to mid-size mainstream brands**
- **Unilever launches Emerge, a purpose-driven, haircare brand for naturals**

Figure 37: Unilever/Sundial Emerge haircare products, 2020

- **“Old-school” brands’ resurgence shows desire for updated effectiveness among familiar names**

Figure 38: J. Strickland & Co. Blue Magic Video, October-December 2019

Figure 39: AfroSheen Instagram Post, April 2020

- **Celebrity haircare brand founders use established name to generate instant trust and trial**

Figure 40: TPH by Taraji Instagram post, January 2020

THE CONSUMER – KEY TAKEAWAYS

- **Haircare segments defined by attitudes toward hair health and style flexibility**
- **Black women switch between textured and protective styles, need products for all looks**
- **Few differences in product purchases across various financial situations**
- **Influencers whose style and identity mimics the consumers’ drive maintenance and product trends**
- **Hair goals, then course correction drive product purchase**
- **Product claims are stronger purchase and trial drivers than ingredients**

BLACK HAIRCARE CONSUMER: TRENDS AND SEGMENTATION

- **Healthy hair takes on different meaning and practices among Black consumers**

Figure 41: Mintel Global Trend Drivers – Rights, Identity, Value

- **Black women’s attitudes and engagement in hair trends drive her product and tool usage**

Figure 42: Black female haircare segmentation, April 2020

- **Conservative Connie sticks to classic looks**

Figure 43: Demographic profile of Conservative Connie haircare segment, April 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



Report Price: £3695 | \$4995 | €4400

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

Figure 44: Attitudes toward haircare, by all women and Conservative Connie, April 2020

- **Easy-going Erica likes to look her best using the right products**

Figure 45: Demographic profile of Easy-going Erica haircare segment, April 2020

Figure 46: Attitudes toward haircare, by all women and Easy-going Erica, April 2020

- **Lively Layla will use any product and method to achieve her perfect hairstyle**

Figure 47: Demographic profile of Lively Layla haircare segment, April 2020

Figure 48: Attitudes toward haircare, by all women and Lively Layla, April 2020

- **Clean living and looks drive Natural Nicole’s style**

Figure 49: Demographic profile of Natural Nicole haircare segment, April 2020

Figure 50: Attitudes toward haircare, by all women and Natural Nicole, April 2020

- **Black men gravitate toward simplicity in their style and product choices**

Figure 51: Black male haircare segmentation, April 2020

HAIR TEXTURE CLASSIFICATION

- **Hair type classification shows differences in engagement, skill and processes**

Figure 52: Hair texture classification, by gender, April 2020

- **Fewer Black women say they have straight texture as they abandon relaxers**

Figure 53: “Straight” hair texture classification – women, 2017-20

HAIRSTYLE PREFERENCES AND TRENDS

- **Textured hairstyles are preferred, protective hairstyles offer flexibility**

Figure 54: Hairstyle preferences and trends in the past three years – women, April 2020

- **Black women more likely to take advantage of flexible hairstyles**

Figure 55: Hairstyles worn in the past three years – women, by current hairstyle, April 2020

- **Young men most likely among all Black men to experiment with styles, products and tools**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

Figure 56: Hairstyle preferences and trends in the past three years – men, by age, April 2020

HAIRCARE PRODUCT PURCHASE AND USAGE

- **Black women most likely to be product switchers based on need and expected results**

Figure 57: Count of types of haircare products purchased in the past year, by gender, April 2020

- **Black women will buy any product deemed necessary to achieve preferred styles**

Figure 58: Haircare product purchases in the past year – women, by current hairstyles worn, April 2020

- **Black men who wear varied styles use the greatest number of products**

Figure 59: Haircare product purchases in the past year – men, by age, April 2020

- **Financial position has little impact on product purchase**

Figure 60: Haircare product purchases in the past year, by current financial position, April 2020

INFLUENCERS ON HAIRCARE MAINTENANCE AND STYLE

- **Personal sources who help rather than sell are most trusted**

Figure 61: Influencers on haircare maintenance and style, April 2020

- **Personal, well-known haircare influencers appear in real life and online for young women**

Figure 62: Influencers on haircare maintenance and style – women, by age, April 2020

- **Hairstyle choices dictate a preference for everyday vs aspirational influencers**

Figure 63: Influencers on haircare maintenance and style – women, by current hairstyles, April 2020

WHAT BLACK CONSUMERS EXPECT FROM HAIRCARE PRODUCTS

- **Black consumers buy products first to transform then correct hair issues**

Figure 64: Expectations from haircare products, April 2020

- **Styles that require the greatest manipulation also drive increased use of course correcting products**

Figure 65: Expectations from haircare products – women, by current hairstyles, April 2020

- **Black men who experiment with their looks want longer hair for greater style flexibility**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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

Report Price: £3695 | \$4995 | €4400

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

Figure 66: Expectations from haircare products – men, by age, April 2020

MARKETING INNOVATION TRENDS OF INTEREST

- **Product claim with a clear benefit for hair issues drive interest**
Figure 67: Haircare trends of interest, April 2020
- **Chemical-free women want natural, “clean” products that promote hair health**
Figure 68: Haircare trends of interest – women, by expectations from haircare products, April 2020
- **Young, experimental men gravitate toward natural, multipurpose products**
Figure 69: Haircare trends of interest – men, by age, April 2020

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX – THE MARKET

- Figure 70: Black consumer spending and forecast on regimen haircare products – table, at current prices, 2015-25
- Figure 71: Black consumer spending and forecast on regimen haircare products – table, at inflation adjusted prices, 2015-25
- Figure 72: Black consumer spending on regimen haircare products – table, by segment, at current prices 2018 and 2020
- Figure 73: Black consumer spending and forecast on shampoo – table, at current prices, 2015-25
- Figure 74: Black consumer spending and forecast on shampoo – table, at inflation-adjusted prices, 2015-25
- Figure 75: Black consumer spending and forecast on conditioner – table, at current prices, 2015-25
- Figure 76: Black consumer spending and forecast on conditioner – table, at inflation-adjusted prices, 2015-25
- Figure 77: Black consumer spending and forecast on styling products – table, at current prices, 2015-25

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
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

Black Haircare: Incl Impact of COVID-19 - US - August 2020



Report Price: £3695 | \$4995 | €4400

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

Figure 78: Black consumer spending and forecast on styling products – table, at inflation-adjusted prices, 2015–25

Figure 79: Black consumer spending and forecast on relaxers – table, at current prices, 2015–25

Figure 80: Black consumer spending and forecast on relaxers – table, at inflation-adjusted prices, 2015–25

Figure 81: Black consumer spending and forecast on hair color – table, at current prices, 2015–25

Figure 82: Black consumer spending and forecast on hair color – table, at inflation-adjusted prices, 2015–25

Figure 83: Multi-outlet sales of Black haircare products, by leading Black haircare companies, rolling 52 weeks 2019 and 2020

Figure 84: Multi-outlet sales of shampoo, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020

Figure 85: Multi-outlet sales of conditioner, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020

Figure 86: Multi-outlet sales of styling products, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020

Figure 87: Multi-outlet sales of relaxers, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020

Figure 88: Multi-outlet sales of hair color, by leading Black haircare companies and brands, rolling 52 weeks 2019 and 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

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



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.