

U.S. Hair Care Market - Focused Insights 2024-2029

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Report description:

The U.S. hair care market is expected to grow at a CAGR of 1.06% from 2023 to 2029.

RECENT VENDOR ACTIVITIES

- In 2023, L'Oreal debuted the iNOA [iD] color tool, enabling clients to explore over 4,000 shades for a personalized hair color experience. This innovation marks a shift toward highly customizable color solutions that help consumers select the perfect shade based on their unique needs. To stay competitive, hair care brands in the U.S. should consider developing or adopting similar color consultation tools to enhance the consumer experience, driving both in-salon and at-home color product sales.

- In 2024, Dove debuted its Scalp + Hair therapy collection marking a major move into the premium hair care segment, focusing on scalp health as the foundation for strong, beautiful hair. Developed with dermatologists, the line promises clinically proven results, which could appeal to consumers looking for both affordability and high-performance solutions. This product line's emphasis on scalp care aligns with the rising trend of consumers prioritizing scalp health as an essential component of overall hair care. US hair care brands should explore similar dermatologically backed formulations that offer scientifically proven benefits, especially in the growing scalp care segment.

KEY TAKEAWAYS

- By Product Type: The shampoo segment holds the largest market share of over 35%, driven by consumers increasingly seeking shampoos tailored to specific hair needs, such as anti-dandruff, and volumizing.

- By Age Group: The Gen Z segment shows the highest growth, with a CAGR of 1.43%. The segmental growth is due to the early adoption of new trends, with a strong inclination toward products that are bold, expressive, and unique.

- By Gender Segment: The female segment dominates and holds the largest market share. The segmental growth is because females tend to have highly individualized routines, often using multiple products, such as shampoos, conditioners, masks, oils, and styling products.

- By Distribution Channel: The offline segment holds the largest market share as consumers continue to value in-store shopping

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experiences.

-□By Category: The premium segment shows the highest growth, as consumers are willing to invest in high-quality, often salon-inspired formulations that deliver enhanced benefits.

-□Growth Factor: The U.S. hair care market is set to grow due to a rising focus on scalp care and an increase in hair-related issues.

MARKET TRENDS & DRIVERS

Technological Advancements

The market is rapidly adopting advanced technologies to transform the way consumers experience and engage with hair care. Artificial Intelligence (AI) algorithms play a significant role, in analyzing customer data to create highly personalized recommendations for each individual's unique hair type, condition, and preferences. AI-powered tools can assess factors like hair porosity, scalp condition, and moisture levels, leading to more precise product recommendations. Major brands are integrating AI-driven platforms that allow consumers to input personal details or complete assessments, generating customized routines and even developing custom-formulated products. Scalp analysis tools and imaging technology are becoming essential in salons and retail settings, helping customers understand their hair and scalp needs on a deeper level. These tools can detect issues such as scalp dryness, dandruff, and thinning hair, which were traditionally only identified through in-person consultations with hair specialists. The Internet of Things (IoT) also introduces a new dimension to the hair care market with connected grooming devices. Smart hairbrushes, for instance, can track brushing patterns, monitor hair health over time, and sync data to an app for analysis. IoT-enabled hair dryers and stylers adjust heat settings based on hair type and styling needs, ensuring minimal damage.

Rise of Personalized & Customized Hair Care Solutions

In today's hair care market, personalization has become a core value, as consumers increasingly look for products that reflect their hair characteristics and unique lifestyle needs. Customization in hair care allows consumers to choose products tailored to their hair type, texture, and even daily habits, offering a more targeted approach to achieving desired hair health and styling outcomes. Many companies are offering digital consultations where users can answer questions about their hair, lifestyle, and specific goals, such as enhancing shine, reducing frizz, or addressing color-treated hair. For instance, brands now provide personalized formulations that can be mixed and matched based on hair condition, season, and even personal fragrance preference, resulting in a one-of-a-kind hair care solution. Some companies are taking it a step further with subscription models that deliver tailored products directly to the consumer's doorstep each month, ensuring that customers never run out of their customized products. This approach not only builds brand loyalty but also appeals to convenience-oriented consumers who appreciate a consistent, hassle-free hair care routine. Additionally, AI-powered algorithms analyze collected data to further refine product recommendations, while virtual consultations connect consumers with hair care experts who can offer real-time advice.

Rising Focus on Scalp Care

Scalp care is gaining recognition as an essential aspect of overall hair health, with U.S. consumers increasingly focusing on the importance of a healthy scalp as the foundation for beautiful hair. Scalp exfoliators, serums, and treatments are becoming popular as consumers recognize that issues like itchiness, dryness, and excess oil can all stem from poor scalp health, impacting hair growth and quality. Traditional hair care routines often overlooked the scalp, but today, brands are educating consumers on the importance of scalp health, leading to a surge in demand for products specifically formulated to cleanse, nourish, and balance the scalp. Scalp-focused products are formulated with ingredients like tea tree oil, salicylic acid, and probiotics, which target concerns like dandruff, inflammation, and scalp pH imbalance. In addition to treating scalp-specific issues, many of these products aim to create an optimal environment for hair growth, thus appealing to consumers looking for comprehensive hair care solutions. As scalp care becomes mainstream, brands are launching product lines dedicated exclusively to scalp health, and salons are increasingly offering scalp treatments as part of their services. This trend highlights the evolution of hair care from a

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styling-centric approach to a more holistic, root-focused routine, catering to consumers who understand that healthy hair starts at the scalp.

INDUSTRY RESTRAINTS

Allergens In Hair Care Products

Allergens in hair care products are becoming a critical concern for both consumers and brands, especially as awareness grows around the impact of ingredients on skin and hair health. Common allergens such as sulfates, parabens, fragrances, and certain preservatives can lead to adverse reactions, including scalp irritation, itching, and even hair loss. With the rise in reported cases of allergies and sensitivities, consumers are becoming more discerning about the ingredients in their hair care products, seeking options that are hypoallergenic, fragrance-free, or free from common irritants. Brands are now challenged to reformulate their products to reduce allergenic content while maintaining effectiveness. This shift often requires additional R&D investment and a reevaluation of ingredient sourcing, particularly as "clean" and "natural" claims are increasingly scrutinized. Additionally, there is rising pressure from regulatory bodies and advocacy groups to clearly label allergens and ensure transparency in ingredient listings. For companies, balancing product efficacy with allergen-free formulations is becoming a key focus to retain customer trust and meet the needs of an increasingly ingredient-conscious market.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT TYPE

The U.S. hair care market by product type is segmented into shampoos, conditioners, styling products, hair coloring, and others. The shampoo segment dominates and holds the largest market share of over 35%. Shampoos are an essential category in the U.S. hair care market, widely used across various demographics. Consumers are increasingly looking for shampoos designed to meet specific hair needs, such as anti-dandruff, volumizing, color-protection, and clarifying formulations. This demand for specialization reflects the broader industry trend where consumers expect products that cater to their unique hair types and scalp conditions. Personalized hair care is also gaining momentum, with brands offering customized shampoo options through quizzes or consultations that address individual needs. This tailored approach allows consumers to select ingredients and formulations that align with their specific hair goals, fostering a stronger connection to the brand and boosting customer satisfaction, thus helping segmental growth.

By Product Type

- Shampoos
- Conditioners
- Styling Products
- Hair Coloring
- Others

INSIGHTS BY AGE GROUP

The U.S. hair care market by age group is categorized into millennials, Gen X, Gen Z, and baby boomers. The Gen Z segment shows significant growth, with the fastest-growing CAGR of 1.43% during the forecast period. Gen Z consumers are early adopters of new trends, favoring bold, expressive, and unique hair care products that allow experimentation, such as temporary color sprays, hair chinks, and styling gels. This demographic is drawn to products that enable vibrant, fashion-forward hairstyles influenced by social media trends. Valuing authenticity and diversity, Gen Z looks for brands that embrace inclusivity and offer products for all hair types and textures, fueling the demand for formulations specifically made for curly, coily, and textured hair,

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as well as inclusive marketing. Social media platforms like TikTok, Instagram, and YouTube are central to their hair care habits, with influencer-driven content and viral products heavily impacting their purchase choices. Brands that create trending, "must-have" products or collaborate with popular influencers often gain significant traction among Gen Z. This behavior is propelling the U.S. hair care market's growth by boosting demand for innovative and inclusive products that cater to diverse preferences and encouraging new purchasing patterns.

By Age Group

- Millennials
- Gen X
- Gen Z
- Baby Boomers

INSIGHTS BY GENDER

The U.S. hair care market by gender is segmented into female and male. The female segment accounted for the largest market share. Women are the largest demographic in the U.S. hair care market, driving significant demand across various product categories. Female consumers often have highly personalized hair care routines that include multiple products, such as shampoos, conditioners, masks, oils, and styling agents, to achieve their desired results. This diversity in preferences fuels a wide range of product offerings and niche solutions within the market. Women commonly seek products that address specific hair concerns such as dryness, frizz, split ends, and color protection, prompting brands to develop targeted solutions with natural oils, protein-rich ingredients, and color-safe formulations. This trend demonstrates a strong preference for quality and performance, as women prioritize products that offer both aesthetic and health benefits for their hair. By driving the development of innovative, targeted solutions, female consumers are contributing to the growth of the U.S. hair care market.

By Gender

- Female
- Male

INSIGHT BY DISTRIBUTION CHANNEL

Based on the distribution channel, the offline segment holds the largest share of the U.S. hair care market. Traditional brick-and-mortar stores remain vital for the distribution of hair care products, as many consumers value the in-store shopping experience. Department stores, specialty beauty retailers, supermarkets, and drugstores provide opportunities to physically examine products, read labels, and make informed decisions, with immediate access and product trials being key benefits. Specialty beauty stores like Sephora and Ulta Beauty play a significant role by offering high-end and niche products, along with personalized recommendations from trained consultants that foster customer loyalty. Convenience stores and pharmacies also contribute by providing quick access to everyday hair care essentials, catering to spontaneous shopping needs. This extensive offline network supports the growth of the U.S. hair care market by ensuring consumers have access to a broad range of products and services.

By Distribution Channel

- Offline
- Online

INSIGHT BY CATEGORY

Based on the category, the premium segment shows prominent growth, with the fastest-growing CAGR during the forecast period.

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Premium hair care products cater to consumers willing to invest in high-quality, salon-inspired formulations that offer superior benefits. Found in specialty beauty stores, upscale retailers, and online platforms, these products focus on efficacy, luxury, and exclusivity. Brands like Oribe, Kerastase, and Olaplex use advanced, specialized ingredients such as argan oil, keratin, and biotin to target specific hair concerns like damage, frizz, and scalp health. These products appeal to those seeking a professional, salon-like experience at home, with luxurious packaging, refined scents, and concentrated formulas that justify their higher price. This consumer preference drives growth in the U.S. hair care market by strengthening the premium segment and encouraging innovation.

By Category

- Mass
- Premium

COMPETITIVE LANDSCAPE

The U.S. hair care market report consists of exclusive data on 30 vendors. The competitive landscape of the U.S. hair care market is shaped by key players, such as L'Oreal, Procter & Gamble, Unilever, Beiersdorf, The Estee Lauder Companies, Amway, Kao Corporation, and Henkel holding a strong market presence. L'Oreal is a dominant player in the U.S. hair care market, known for its extensive product portfolio, which spans luxury to mass-market offerings. Its brands like L'Oreal Paris and Redken lead in both professional salon and retail spaces. P&G's brands, especially Pantene and Head & Shoulders, are household names in the U.S. hair care market. The company holds a significant share in both mass-market and value segments. Amway's hair care products, particularly under the Satinique brand, cater to the premium segment of the U.S. market.

Key Vendors

- L'Oreal
- Procter & Gamble
- Unilever
- Beiersdorf
- The Estee Lauder Companies
- Amway
- Kao Corporation
- Henkel

Other Prominent Vendors

- Herbalife
- Moroccanoil
- Shiseido
- John Paul Mitchell Systems
- Revlon
- Tropical Products
- The Honest Company
- Johnson & Johnson
- Olaplex
- Bread Beauty Supply
- adwoa beauty
- Thank God It's Natural
- Virtue Labs
- Design Essentials

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KEY QUESTIONS ANSWERED:

- 1.□How big is the U.S. hair care market?
- 2.□What are the latest trends in the U.S. hair care market?
- 3.□Which product type has the largest share in the U.S. hair care market?
- 4.□Who are the key players in the U.S. hair care market?

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