

India Beauty and Personal Care Market Growth Analysis - Forecast Trends and Outlook (2025-2034)

Market Report | 2025-08-11 | 122 pages | EMR Inc.

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Report description:

The India beauty and personal care market was valued at USD 23.99 Billion in 2024 . The industry is expected to grow at a CAGR of 10.80% during the forecast period of 2025-2034 to reach a value of USD 66.90 Billion by 2034 .

The India beauty and personal care market is currently fuelled by wellness-oriented consumers, a tech-savvy millennial base, and the steady rise of D2C startups. The shift is being shaped by local ingredient innovations, holistic beauty routines, and smart packaging technologies. Rising disposable incomes and growing health consciousness are encouraging urban buyers to adopt "clean beauty" trends, while tier-II and III markets are evolving rapidly through affordable, regionalised offerings.

Government initiatives such as the "Startup India" programme and incentives under the Production Linked Incentive (PLI) Scheme for manufacturing are catalysing domestic product development, boosting the growth of the India beauty and personal care market. For instance, organic skin brands like Juicy Chemistry and Bare Anatomy have scaled due to robust R&D aided by these schemes, with Juicy Chemistry recently raising over USD 6 million in funding. Simultaneously, penetration in rural regions is being supported by government-backed digital inclusion projects like BharatNet and PM-WANI, enabling regional brands to engage untapped demand.

Moreover, the shift towards Ayurveda-integrated personal care products has been a major trend in the India beauty and personal care market. The Ministry of AYUSH's endorsements and schemes such as Ayushman Bharat are indirectly bolstering this category. MNCs are also localising operations. For instance, L'Oreal's technology lab in Mumbai now focusses on heat-resistant and pollution-neutralising product formulations, designed for Indian climates.

Key Trends and Recent Developments

April 2025

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With the introduction of Lovetec, a high-end cosmetic brand designed to carve out a niche in the high-performance makeup market, Ananya Birla joined India's expanding market. The Aditya Birla Group supports this brand under the line of Birla Cosmetics Private Limited.

February 2025

With the introduction of its skincare and haircare line, luxury personal care company Karmic Beauty made its debut in the Indian beauty and personal care market. The brand will provide high-end self-care items in both skincare and haircare areas.

October 2024

Eucerin formally entered the Indian market by launching its products on Nykaa. The launch presents two of Eucerin's most popular product lines to Indian consumers: the Sun Protection line, which is renowned for its state-of-the-art UV protection and skin health advantages, and the Anti-Pigment line, which tackles hyperpigmentation and uneven skin tone.

March 2024

Kylie Cosmetics entered India in a partnership with House of Beauty. This was for the first time that Kylie Cosmetics partnered with an Indian omnichannel specialist. The brand is available across 25 Sephora India stores.

Ayurveda-Technology Fusion Fuelling Demand

The blending of Ayurvedic science with modern technology is turning into a serious innovation frontier, boosting India beauty and personal care market opportunities. Brands like Forest Essentials are leveraging nano-emulsion technology to create stable herbal actives, enhancing efficacy without synthetic preservatives. Government R&D grants through the Ministry of AYUSH have surged for integrative health innovation. These moves legitimise traditional formulations in global B2B circles. The success of Kapiva's data-backed herbal wellness line, developed using consumer feedback proves that ancient science, when clinically validated and digitised, offers scalable models that appeal to both domestic and export-oriented stakeholders.

Personalisation via AI and Skin Diagnostics

India beauty and personal care companies are deploying AI tools to offer hyper-personalised experiences. Sugar Cosmetics' AI-powered "Try-On" tool has boosted conversion by a significant extent, while Skinkraft's skin questionnaire is now backed by genetic profiling algorithms. Such tools reduce returns and increase LTV (lifetime value) among B2B buyers. These innovations align well with global procurement teams seeking reliable, scalable, and tech-integrated private label products. Additionally, AI-driven demand forecasting and inventory optimisation tools are helping B2B partners manage seasonal shifts and regional preferences, significantly lowering stockouts and overproduction risks across distribution chains.

Sustainable and Waterless Formulations Gaining Traction

Waterless beauty is emerging as a key trend in the India beauty and personal care market, reducing carbon footprints and enabling longer shelf-life. Brands such as Earth Rhythm and Conscious Chemist are formulating powder-based cleansers and concentrated face serums to minimise plastic and water use. Backed by India's EPR (Extended Producer Responsibility) mandates and green chemistry incentives, these formats reduce dependency on preservatives. For institutional buyers, these innovations bring logistics and packaging savings. The Indian government's "Zero Effect, Zero Defect" scheme also supports eco-innovation, prompting MSMEs to offer green-certified B2B products.

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Rise of Indie D2C Brands Disrupting B2B Channels

New-age brands like Minimalist and Dot & Key have successfully blurred the B2B-D2C line by offering white-label options, contract manufacturing, and B2B services alongside direct consumer products, accelerating the India beauty and personal care market scope. These companies operate with lean inventory models, often using real-time e-commerce analytics to dictate R&D activities. Enabled by investor confidence and flexible warehousing policies under Gati Shakti, they are tapping into hyperlocal as well as export markets. This presents opportunities for ingredient suppliers, private-label manufacturers, and formulation specialists who can serve custom, agile batches at scale.

Men's Grooming and Gender-Neutral Beauty Segments Expanding

The men's grooming segment is moving beyond beard oils into skincare, anti-ageing, and fragrance. Beardo, The Man Company, and Bombay Shaving Co. are collaborating with biotech firms to develop hormone-safe actives, boosting further demand in the India beauty and personal care market. Gender-neutral beauty lines are also rising, with brands like FAE Beauty removing gendered marketing. Support from India's Ministry of MSME for diversity-led startups has encouraged gender-agnostic formulation labs. These shifts unlock niche B2B demand for neutral scent profiles, safe actives, and flexible packaging lines that can serve dual categories across distributors and salons.

India Beauty and Personal Care Industry Segmentation

The EMR's report titled "India Beauty and Personal Care Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Type

- Conventional
- Organic
- Vegan

Key Insight: The beauty and personal care market in India spans across conventional, organic, and vegan categories. Conventional formats dominate the industry owing to mass appeal and pricing advantages. Organic products are carving out niche segments via Ayurveda-rooted, chemical-free solutions. Vegan beauty is fast accelerating, backed by conscious consumers and regulatory clarity. Key drivers across segments include urbanisation, rising disposable income, growing skin health awareness, and digital-first distribution. B2B stakeholders benefit from increasing private-label demand, flexible formulations, and government-led ingredient R&D.

Market Breakup by Product

- Hair Care
- Skin Care
- Oral Cosmetics
- Colour Cosmetics
- Fragrances
- Others

Key Insight: The India beauty and personal care industry can be segmented into skin, hair, fragrance, oral, and colour cosmetics.

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Skin care dominates the market with multifunctional and customised solutions, while hair care has become fastest-growing segment due to emerging scalp and damage-care trends. Fragrances and colour cosmetics are evolving with niche segments and premiumisation. Oral cosmetics are also diversifying with probiotic and whitening innovations.

Market Breakup by Distribution Channel

- Direct Sales
- Supermarkets and Hypermarkets
- Convenience Stores
- Chemist/Pharmacy Stores
- Exclusive/Multi-Brand Outlets
- Salons and Spa
- Online
- Others

Key Insight: Distribution channels that are driving continuous India beauty and personal care market revenue growth include online, salons, supermarkets, chemist chains, and exclusive outlets. Online leads the market due to convenience and analytics-backed scalability. Salons are emerging as high-growth touchpoints with custom product demand. Supermarkets offer mass coverage, while chemists cater to semi-dermatological care. Each channel has unique requirements in formulation, packaging, and margin structure.

Market Breakup by Region

- West and Central India
- North India
- East India
- South India

Key Insight: The India beauty and personal care market varies regionally, with the West dominating via manufacturing scale and organised retail. South India represents the fastest-growing regional market due to the growing acceptance of technology in beauty and hybrid wellness preferences. North India remains branding-centric, with Delhi-NCR as a marketing base. East India is still emerging, offering untapped growth opportunities in wellness and herbal beauty.

India Beauty and Personal Care Market Share

By Type, the Conventional Segment Registers the Largest Share of the Industry

Conventional beauty and personal care products continue to dominate the Indian market due to affordability and mass availability. Brands like Hindustan Unilever and Dabur rely on robust distribution networks that reach over 6 million retail outlets, giving them a pricing edge. Their large-scale production capabilities allow cost control, enabling their products to be staples across urban and rural areas, fuelling the beauty and personal care demand in India. B2B procurement in this segment focuses on bulk packaging, shelf-stable formulations, and high-volume distribution logistics. Conventional lines are also adopting subtle upgrades like micro-encapsulation for longer fragrance retention, to stay competitive against emerging natural and organic formats.

Vegan personal care is growing at a fast pace, as per the India beauty and personal care market report, as both millennial consumers and urban salons demand for cruelty-free, plant-derived formulations. Startups like Plum and Conscious Chemist are

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scaling with sugar-derived surfactants and mushroom-based exfoliants. Recently, India's Central Drugs Standard Control Organisation (CDSCO) relaxed licensing norms for plant-based ingredients, giving vegan brands regulatory clarity. This spurred contract manufacturers to develop vegan-certified processing units. For B2B players, this indicates expanded white-label opportunities, lower regulatory risk, and growing export opportunities aligned with Europe and United States compliance.

By Product, Skin Care Dominates the Market with a Strong Foothold

Skin care commands the largest share in the Indian beauty and personal care market. It includes serums, moisturisers, and cleansers formulated for diverse skin tones and climate conditions. Urban brands are focusing on pollution-neutralising actives and blue light defence, driven by high urban pollution levels. Even legacy brands like Himalaya are reformulating with ingredients like Centella Asiatica and Bakuchiol. Startups like Foxtale are offering AI-enabled product pairing, creating lucrative B2B opportunities with salons and e-retailers.

India's hair care market is rapidly evolving, moving beyond shampoos into scalp serums, heat protectants, and hair masks. Consumers demand targeted solutions including anti-dandruff, anti-greying, and anti-pollution care products. In response, companies like Pilgrim and Arata are launching sulphate-free, mushroom peptide-infused products. Government-backed biotech parks in Hyderabad and Pune are also supporting R&D in hair biology, opening up new opportunities for B2B ingredients markets.

By Distribution Channel, the Online Segment Clocks in the Maximum Revenue Share

Online platforms have taken the lead in boosting the India beauty and personal care market revenue. The segment's dominance is supported by tier-2 and tier-3 digital adoption. Companies like Nykaa, Amazon, and Purplle are enabling new brands to scale rapidly, offering end-to-end B2B services like warehousing, fulfilment, and customer analytics. Beauty ecommerce sales recorded 39% sales in June to November 2024. Moreover, SaaS integrations allow contract manufacturers to optimise based on real-time e-commerce trends. For B2B buyers, online sales data helps reduce inventory risk and enhances forecast accuracy.

Salon and spa formats are gaining rapid traction in the India beauty and personal care market owing to rising premiumisation and experiential beauty. Tier-2 cities are seeing branded salon chains like Enrich and Naturals expand aggressively. These outlets offer high-performance, result-driven solutions like overnight facials, scalp detox kits, and fast-action peels. Beauty brands like Cheryl's Cosmeceuticals are offering on-site product training to salons, building loyalty and boosting product demand. Government-subsidised skill development schemes like PMKVY are also ensuring trained personnel for these outlets.

India Beauty and Personal Care Market Regional Analysis

By Region, West and Central India Secures the Leading Position in the Market

The West and Central region dominates the beauty and personal care industry in India with Mumbai, Pune, and Ahmedabad serving as beauty retail and manufacturing hubs. Maharashtra houses several manufacturing units, distribution warehousing, and key innovation labs. With robust infrastructure and high urban demand, the region supports both luxury and mass market segments. B2B players find this region favourable due to efficient logistics and skilled workforce availability.

South India is seeing strong growth in terms of beauty and personal care demand, particularly in Chennai, Hyderabad, and Bengaluru. Consumers in this region are tech-savvy and wellness-conscious. They favour hybrid skincare, products combining Ayurvedic roots with Korean formulation science. Brands like TVAM and Daughter Earth are expanding regionally, fuelled by digital-first strategies and local supply chains. Telangana's T-Hub and Karnataka's Elevate programme are supporting beauty-tech startups, creating new opportunities for B2B collaborations. Ingredient suppliers, formulators, and packaging vendors are increasingly targeting this region as it offers innovation receptivity and cross-border supply routes via port cities.

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Competitive Landscape

India beauty and personal care market players like HUL, L'Oreal, and P&G are competing with agile D2C brands like Mamaearth, The Moms Co., and Pilgrim. White-label manufacturing, cosmeceutical packaging, and on-demand production have become the key areas of focus. Smaller players who can provide custom formulations, fast iterations, and sustainable formats are finding buyers across retail, hospitality, and e-commerce sectors.

In addition, several India beauty and personal care companies are entering B2B partnerships, like L'Oreal is collaborating with Indian suppliers for climate-resilient actives and MyGlamm is offering OEM services. The scope for growth lies in launching new products and in co-creating them with salons, dermatologists, and wellness platforms. Regulatory encouragement through vegan certification, export facilitation, and Make-in-India branding further open international B2B opportunities.

The Procter & Gamble Company

Established in 1837 and headquartered in Cincinnati, Ohio, The Procter & Gamble Company has positioned itself as a market leader through brands like Olay, Gillette, and Head & Shoulders. The company localises product formulations to suit Indian skin and hair conditions, while also investing in sustainability and inclusive advertising to appeal to the growing eco-conscious and gender-diverse Indian consumer base.

Beiersdorf AG

Beiersdorf AG, headquartered in Hamburg, Germany, is a skincare company that offers products aimed at premium, dermocosmetics, and mass markets. With its history dating back to 1882, it boasts 20,000 employees globally.

Revlon Inc.

Revlon has established its position as a leading beauty company that manufactures and markets hair care and colour, fragrances, beauty care, colour cosmetics, and skincare products. Its portfolio of over 15 brands is available in nearly 150 countries.

L'Oreal S.A.

L'Oreal, established in 1909, is a leading global personal care and beauty company. Headquartered in Hauts-de-Seine, France, its products are aimed to meet the diverse beauty demands of men and women. In September 2023, L'Oreal announced its entry into the Indian dermocosmetic sector and launched L'Oreal Dermatological Beauty (LDB) to offer dermatological care and effective skincare solutions to customers.

Other key players in the market are Kao Corporation, The Estee Lauder Companies Inc., Colgate-Palmolive Company, Godrej Group, Patanjali Ayurved Limited, Dabur India Ltd, and Johnson & Johnson Services, Inc., among others.

Key Features of the Report

- In-depth analysis of India beauty and personal care market size and forecast.
- Comprehensive segmentation by type, product, distribution channel, and region.
- Market trends, drivers, and regulatory developments.
- Competitive landscape and strategic company profiling.
- Recent investments and infrastructure expansion impact.

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- Technological innovations and future market outlook.

Why Choose Expert Market Research?

- Trusted insights backed by extensive primary research.
- Actionable data for strategic decision-making.
- Region-wise and type-specific analysis.

Call to Action

Explore the latest trends shaping the India Beauty and Personal Care Market 2025-2034 with our in-depth report. Gain strategic insights, future forecasts, and key market developments that can help you stay competitive. Download a free sample report or contact our team for customized consultation on India Beauty and Personal Care Market Trends 2025 .

India Beauty and Personal Care Market?Report Snapshots

India Beauty and Personal Care?Companies

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