North America Beauty And Personal Care - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 150 pages | Mordor Intelligence

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Report description:

North America Beauty And Personal Care Market Analysis

The North American Beauty and Personal Care market size is estimated at USD 151.32 billion in 2025 and is expected to reach USD 179.84 billion by 2030, growing at a CAGR of 3.51%. The industry continues to expand despite inflationary pressures and evolving consumer preferences in discretionary spending categories. Market growth is increasingly driven by premiumization and channel diversification rather than pure volume gains. The digital transformation has enabled the growth of specialized segments, such as textured-hair care and inclusive complexion products, which previously faced scaling limitations in traditional retail environments. Moreover, companies are using data analytics to create targeted customer outreach, resulting in improved customer lifetime value while maintaining efficient marketing expenditure.

North America Beauty And Personal Care Market Trends and Insights

Increasing Skin Concerns Among Consumers

The increasing incidence of acne, eczema, and sensitive-skin conditions is driving product development across all price segments. Environmental factors, including particulate pollution, indoor heating, and blue-light exposure, are increasing inflammatory skin responses, leading consumers to seek products with dermatological validation. According to the American Academy of Dermatology, in 2024, acne affected approximately 50 million Americans annually . This trend indicates that the demand for barrier-repair products is expanding from medical-grade offerings to mass retail channels, as consumers increasingly view preventative skincare as a daily necessity. In April 2024, a major aesthetics manufacturer launched clarifying treatments that serve both therapeutic and cosmetic purposes, demonstrating the convergence of scientific validation and beauty products. This integration is creating a new market segment that combines over-the-counter efficacy with enhanced user experience, influencing the North American Beauty and Personal Care market.

Growing Awareness About Oral Hygiene and Dental Health

The oral care market size is driven by increasing awareness of preventive dental health. According to the Centers for Disease Control and Prevention (CDC), more than 21% of United States adults between the ages of 20-64 had untreated cavities in 2024 . These health concerns have led to increased adoption of advanced dental care products, including oscillating and sonic toothbrushes. The market is evolving toward subscription-based models for brush head replacements and oral care products, creating stable revenue streams. The integration of improved battery technology and recyclable materials in oral care products addresses growing environmental concerns. Consumer preference for premium oral care products suggests that North American oral care manufacturers may position their products similarly to skincare offerings, bridging the gap between dental hygiene and beauty products.

Consumer Concerns Over Product Safety and Ingredients

Under the Modernization of Cosmetics Regulation Act (MoCRA), the safety landscape for cosmetics has undergone a significant transformation. The Food and Drug Administration (FDA) required cosmetic manufacturing facilities to complete registration and submit product listings by July 1, 2024. Starting January 2025, Washington State's Toxic-Free Cosmetics Act will prohibit certain chemicals, including lead. Meanwhile, states like California, Colorado, and Minnesota are enforcing restrictions on PFAS. In 2024, California's Proposition 65 litigation led to nearly 5,000 violation notices, with a primary focus on titanium dioxide and diethanolamine, as reported by Lexology. This intricate regulatory environment imposes compliance costs that weigh heavily on smaller brands, while larger, established players capitalize on their regulatory expertise for a competitive edge. As a result, brands are now tasked with the challenge of harmonizing ingredient innovation with stringent safety substantiation requirements. This balancing act could potentially elongate product development timelines and escalate formulation costs.

Other drivers and restraints analyzed in the detailed report include:

Influence of Social Media Platforms / Consumers' Inclination Towards Natural and Organic Products / Counterfeit Products Affecting Brand Reputation /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Personal Care Products command 82.23% market share in 2024 while maintaining the fastest growth trajectory at 4.13% CAGR through 2030, reflecting consumer prioritization of daily wellness routines over occasional cosmetic enhancement. This dominance stems from its essential role in daily hygiene routines, long-term skin maintenance, and comprehensive personal grooming needs. The market is expanding through the convergence of wellness and beauty products, as evidenced by new offerings like adaptogenic body washes and microbiome-supporting deodorants. The integration of wellness principles has created opportunities in previously untapped market segments, particularly in natural and sustainable product categories.

Large companies maintain their market position through dermatologist endorsements and extensive research capabilities, while smaller companies compete by focusing on specialty ingredients, sustainable sourcing practices, and simplified packaging. The industry's increasing emphasis on scientifically validated natural ingredients indicates a shift toward bio-fermented components with proven efficacy, supported by clinical studies and consumer trials. These evolving consumer preferences and expanded product offerings position the North American Beauty and Personal Care market for sustained growth through increased household adoption, product diversification, and higher profit margins in the personal care segment.

Mass Products maintains 70.84% market share in 2024, yet Premium products demonstrate superior growth at 5.12% CAGR, indicating consumer willingness to invest in higher-value offerings despite inflationary pressures. Mass market products maintain broad accessibility through competitive pricing and wide distribution networks, while premium offerings continue to grow through experiential retail strategies and sophisticated brand storytelling. Market analysis reveals the increasing significance of "masstige" products - positioned between mass market and premium segments - which attract consumers from both categories by offering elevated quality at accessible price points.

The premium segment of North America's beauty and personal care market is experiencing growth through retailer implementation strategies. These include optimized lighting systems, product display optimization, and premium inventory management, which establish high-end retail environments while retaining value-oriented consumer segments. The market expansion stems from companies implementing sustainability practices, research-based formulations, and supply chain transparency, facilitated by established distribution partnerships.

The North America Beauty and Personal Care Market is Segmented by Product Type (Personal Care, Cosmetics/Make-up), Category (Premium Products, Mass Products), Ingredients (Conventional/Synthetic, Natural/Organic), Distribution Channel (Specialist Stores, Supermarkets/Hypermarkets, and More), and Geography (United States, Canada, Mexico, Rest of North America). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

L'Oreal S.A. / Unilever PLC / Procter & Gamble Company / The Estee Lauder Companies Inc. / Kenvue Inc. / Coty Inc. / Mary Kay Inc. / Colgate-Palmolive Company / LVMH Moet Hennessy Louis Vuitton / Natura & Co Holding S.A. / Revlon Group Holdings LLC / e.l.f. Beauty Inc. / Shiseido Company Ltd. / Beiersdorf AG / Henkel AG & Co. KGaA / Kao Corporation / Church and Dwight Co. Inc. / Edgewell Personal Care Company / The Honest Company Inc. / Glossier Inc. / Burt's Bees (The Clorox Company) / Anastasia Beverly Hills LLC /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

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