

South Korea Hair Care - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

South Korea Hair Care Market Analysis

The South Korean hair care market size is expected to grow from USD 1.33 billion in 2025 to USD 1.76 billion by 2030, at a CAGR of 5.70%. Driven by surging demand, K-beauty hair care products are increasingly fusing traditional herbal ingredients with cutting-edge biotechnology to address specific hair concerns. This market expansion underscores South Korea's stature as a global beauty trendsetter. Notably, innovations in scalp care and tailored formulations are resonating with consumers of all ages, as these products cater to diverse hair types and needs. By melding time-honored Korean ingredients, such as ginseng, known for its strengthening properties, green tea for its antioxidant benefits, and camellia oil for hydration, with contemporary formulation methods, these products have garnered appeal both at home and abroad. Furthermore, a growing recognition of scalp health as pivotal to overall hair wellness has spurred heightened research and development in targeted treatments, including scalp serums, exfoliators, and nourishing masks, which aim to provide comprehensive care.

South Korea Hair Care Market Trends and Insights

Influence of social media and celebrity endorsement

Instagram and Facebook have become the primary platforms for users, from teenagers to those in their 40s, to discover hair care products, significantly influencing their purchase intentions. Data from 2024, released by South Korea's Ministry of Science and ICT, reveals that 41% of South Koreans engage with social network services over 20 times a week. Across various platforms,

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consumers are increasingly drawn to online content, where celebrity endorsements and influential marketing play a pivotal role in capturing their attention. This evolution marks a significant shift from conventional advertising methods. Research highlights the importance of content uniqueness and strong community connections, especially among K-beauty creators, in shaping the emotional expectations of global consumers. Trends from South Korea's social media are swiftly gaining worldwide attention, underscoring the global resonance of Korean fashion and beauty content. The rise of live commerce, intertwined with social media, is reshaping purchasing behaviors, enabling real-time interactions between buyers and sellers—something traditional e-commerce struggles to achieve. This dynamic not only enriches the shopping journey but also empowers brands to present their products in a more engaging and customized way, amplifying consumer interest and driving conversions.

Strong demand for products formulated with clean label ingredients

Consumer behavior has pivoted towards ingredient-centric purchasing, a shift propelled by platforms like Hwahae that champion detailed ingredient analysis and consumer education. Concurrently, the Ministry of Food and Drug Safety has intensified its regulatory scrutiny, banning ingredients such as hydroquinone, select parabens, triclosan, and benzophenone, citing health and environmental concerns. This regulatory landscape favors companies that swiftly pivot, reformulating with safer alternatives. This is evident in the rising popularity of ingredients like Centella Asiatica, Niacinamide, and Mugwort in hair care. Consumers are now willing to pay a premium for clean-label products, signaling a lifestyle shift where beauty purchases resonate with broader health and environmental values. Established manufacturers are pouring investments into sourcing natural ingredients and ensuring transparent labeling. This trend also carves out opportunities for smaller brands that can showcase superior ingredient safety profiles.

Health concerns over chemical ingredients

In response to rising concerns over chemical ingredient safety, the Ministry of Food and Drug Safety has taken decisive regulatory actions. Recently, they enforced the removal of PABA-containing products from e-commerce platforms, citing potential risks of liver and kidney damage. South Korea's regulatory stance has grown more precautionary, often setting standards that are stricter than many global counterparts. Notably, the country has implemented bans on substances like formaldehyde, coal tar dyes, and certain UV filters. Such stringent measures pose challenges for manufacturers, especially those catering to both domestic and international markets, as they grapple with compliance costs and the need for reformulation. While the push for ingredient transparency has empowered consumers, it has also heightened anxieties surrounding chemical safety. This heightened concern can influence purchasing decisions, even for ingredients that have received regulatory approval. As a result, companies find themselves in a delicate balancing act: meeting efficacy demands while addressing safety perceptions. This often necessitates substantial Research and Development investments to craft alternative formulations that uphold product performance without compromising on safety concerns.

Other drivers and restraints analyzed in the detailed report include:

Rising awareness of scalp health / Growing demand for personalized hair care solutions / Proliferation of counterfeit products /

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

Segment Analysis

In 2024, shampoo dominates the market with a commanding 39.54% share, highlighting its essential role in daily hair care across all demographics. Its widespread usage stems from its fundamental role in maintaining hair hygiene and health, making it a staple product in personal care routines. Hair styling products, however, are rapidly gaining ground, boasting a 6.34% CAGR projected through 2030. This growth is driven by evolving consumer preferences for versatile styling and the global hair fashion industry's

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nod to K-beauty trends. The rising popularity of the styling segment reflects a broader lifestyle evolution, with consumers increasingly valuing products that enable quick style transitions for diverse occasions. This trend gains significance in today's world, where remote work and an amplified social media presence heighten the demand for at-home styling. Additionally, the increasing availability of innovative styling products, such as heat protectants and multi-functional sprays, further supports this segment's growth.

Conditioners and hair colorants maintain a steady demand as established segments, but the "other product types" category is buzzing with innovation. This evolving segment now encompasses scalp treatments, hair masks, and specialized serums, tackling concerns that go beyond basic cleansing and conditioning. These products address issues such as scalp health, hair damage repair, and hydration, catering to a growing consumer base seeking targeted solutions. Moreover, the fusion of hair care with skincare principles has ushered in treatments that apply the same scientific attention to hair and scalp as is standard in facial skincare. This trend reflects a shift towards holistic hair care, where consumers prioritize products that combine functionality with advanced formulations to achieve healthier and more manageable hair.

In 2024, mass products command a dominant 75.34% share of the market, highlighting South Koreans' value-driven purchasing habits, irrespective of their income levels. These products cater to a broad audience by offering affordability and functionality, making them a staple in the daily lives of consumers. On the other hand, premium products are charting a growth path, expanding at a notable 6.75% CAGR. This trajectory indicates a pronounced shift towards premiumization, with consumers prioritizing quality, efficacy, and brand prestige, often at the expense of price considerations. This evolution resonates with the nation's economic journey, where rising disposable incomes are increasingly directed towards high-end personal care products, reflecting a growing willingness to invest in superior offerings.

The rise of the premium segment underscores a discerning consumer base eager to invest in products that deliver tangible results or unique experiences. This shift is driven by heightened awareness of product benefits, increased exposure to global beauty trends, and a desire for self-care indulgence. Brands like MEDIPEEL are capitalizing on this trend, with their 'Extra Super 9 Plus Glow Lifting Wrapping Mask' selling over 200,000 units monthly, and their pore care line boasting annual sales exceeding USD 7.83 million in 2024. Additionally, the premium segment benefits from K-beauty's global reputation, as international recognition of Korean beauty innovations amplifies domestic demand for premium products. This global acclaim not only enhances consumer trust but also reinforces the perception of premium products as aspirational and worth the investment.

The South Korea Hair Treatment Market is Segmented by Product Type (Shampoo, Conditioner, Hair Styling Products, Hair Colorants, and Others), Distribution Channel (Supermarkets/Hypermarkets, Specialty Stores, Online Retail Stores, and Other Distribution Channels). Category (Premium and Mass), and Ingredient Type (Natural and Organic, and Conventional/Synthetic). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Amorepacific Corporation / LG Corporation / Kao Corporation / The Procter & Gamble Company / Nature Republic, Inc. / Unilever Plc / Kenvue Inc. / L'Oreal SA / Shiseido Company, Limited / Henkel AG & Co. KGaA / Mandom Corporation / ENPRANI Co. Ltd / Kolmar Group AG / Hyundai Pharm co., Ltd (Dr.FORHAIR) / Dooree International Co Ltd / Miz Trading Co., Ltd / Missha Co., Ltd / Aromatica co., Ltd / L&P Cosmetic Co., Ltd / The Estee Lauder Companies Inc. /

Additional Benefits:

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

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