Beauty and Personal Care in the US

May 2025

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Deodorants continues to capture consumer dollars in 2024 amidst normalising price conditions
Total body deodorants still on the rise, with additional launches from legacy players' brand lines
Unique collaborations and formulation angles continue to bring attention to deodorants

PROSPECTS AND OPPORTUNITIES

Deodorants expected to maintain steady growth over the forecast period
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CATEGORY DATA

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Depilatories in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Depilatories declines as other at-home hair removal methods gain ground
Gillette Venus and Eos capture consumers with experience-driven campaigns and shaving products
Hair removal brands expand into whole body care amidst changing consumer trends

PROSPECTS AND OPPORTUNITIES

Gen Z drives demand for playful, spa-like hair removal experiences
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CATEGORY DATA

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Fragrances in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Ongoing adoption of fragrances in consumers' beauty routine continues supporting growth in 2024
Body mists capture the attention of players and consumers across the price spectrum
While department stores struggle, attention is turned towards e-commerce

PROSPECTS AND OPPORTUNITIES

Positive outlook for fragrances in the forecast period, despite potential for more value-conscious consumers
Brand efforts to focus on exploring the emotional or functional benefits of fragrances

Digital avenues will open doors to build engagement with consumers, but also contribute to a more competitive environment

CATEGORY DATA

Hair Care in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hair care growth remains stable despite slowdowns across beauty and personal care
Category leaders and indie disruptors continue to compete for consumers' attention through new, innovative, and premium product launches
Hair care distribution continues to be dictated by e-commerce presence and expansion of brands in physical retail

PROSPECTS AND OPPORTUNITIES

Salon professional hair care expected to outperform overall hair care over the forecast period
Non-hair care beauty and personal care players are entering the hair care space
Innovative scalp care portfolios expected to continue to dominate over the forecast period

CATEGORY DATA

Men's Grooming in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Easing growth performances in men's grooming, especially in men's shaving
Some brands are moving away from a strict male focus, embracing gender-neutral offerings and unique collaborations
Expanded portfolio distribution through online platforms

PROSPECTS AND OPPORTUNITIES

Dermocosmetics skin care brands set to benefit from more attention from men, due to gender-neutral positioning and expansive skin care education
Men's deodorants to witness further innovative scent and fragrance launches
Continued traction in the male celebrity brand space

CATEGORY DATA

Oral Care in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Value declines driven by price-sensitive consumers and a desire for multifunctional products
Colgate-Palmolive Co and The Procter & Gamble Co lead oral care, while Church & Dwight Co Inc drives growth
Ingredient-led categories driving innovation in naturals and gut health support

PROSPECTS AND OPPORTUNITIES

Awareness of gum disease fuels innovation
Sensory experience and visual aesthetic driving interest amongst children and Gen Z consumers
High prices of at-home whitening devices and AI power toothbrushes could hamper growth

CATEGORY DATA

Skin Care in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Growth slows to low single digits in 2024, amidst normalisation of skin care routines
Dermocosmetics-positioned brands again outperform in 2024, but pressure increases from newcomers leaning into ingredient-driven narratives
Retail e-commerce continues gaining share, while department stores and pharmacies struggle to keep up

PROSPECTS AND OPPORTUNITIES

Consumers’ purchasing behaviour expected to become more cautious or strategic in the forecast period, moderating the growth of skin care
Longevity trend will continue driving consumers towards dermocosmetic, clinical, or ingredient-led beauty brands
Digitalisation will continue supporting the rise of K-beauty and other international beauty brands

CATEGORY DATA

Sun Care in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Heightened health awareness drives growth for sun protection
Edgewell Personal Care Brands LLC continues to lead sun care in 2024, while dermocosmetics and indie brands gain share
Digitalisation plays a pivotal role

PROSPECTS AND OPPORTUNITIES

Innovation focusing on value-added features will continue to drive growth in sun care
Advances in self-tanning product formulations to drive growth
Growing emphasis on sustainability and safety considerations present new opportunities for product development and growth

CATEGORY DATA

Premium Beauty and Personal Care in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Premium beauty and personal care continues driving industry growth in 2024, supported by the strong performance of fragrances
L'Oréal USA Inc benefits from a strong portfolio in dermocosmetics, helping maintain its leading position in premium beauty and personal care
The ascendancy of health and wellness trends influencing premium categories

PROSPECTS AND OPPORTUNITIES

Premium beauty and personal care set to outperform mass, with premium brands expected to focus on offering entry-level or accessible products
Healthy ageing and preventive wellness will be key areas of opportunity for companies, with the blurring of beauty and health
Premium beauty and personal care expected to witness further strategic moves to establish value, from innovative product launches to technology

CATEGORY DATA

Mass Beauty and Personal Care in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mass beauty and personal care witnesses modest growth, with highlights being bath and shower and deodorants
Established legacy players dominate, while indie brands are proving to be strong competitors
Private label and dupes satiate cost-conscious consumers, and brands expand into budget retailers and warehouse clubs

PROSPECTS AND OPPORTUNITIES

Rise of masstige offerings with elevated ingredient formulations to capture consumer dollars
Retailers and brands target new shoppers across the price spectrum
Digitalisation hones-in on immediacy and affordability

CATEGORY DATA

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