



Euromonitor
International

Beauty and Personal Care in the US

May 2025

Table of Contents

EXECUTIVE SUMMARY

Beauty and personal care in 2024: The big picture
2024 key trends
Competitive landscape
Retail developments
What next for beauty and personal care?

MARKET DATA

- Table 1 - Sales of Beauty and Personal Care by Category: Value 2019-2024
- Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2019-2024
- Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2021-2024
- Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2019-2024
- Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2019-2024
- Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2024
- Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2024-2029
- Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Baby and child-specific products witnesses modest growth in 2024, with the strongest increase for baby and child-specific sun care
Inclusivity influences product launches in baby and child-specific hair care
E-commerce continues to gain share

PROSPECTS AND OPPORTUNITIES

Steady growth anticipated over the forecast period, supported by innovation and more sophisticated formulations
Health and wellness trend will bolster demand for dermocosmetics brands
Gen Alpha's obsession with skin care could drive the growth of baby and child-specific skin care, but also raises concerns

CATEGORY DATA

- Table 11 - Sales of Baby and Child-specific Products by Category: Value 2019-2024
- Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2019-2024
- Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2019-2024
- Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2020-2024
- Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2021-2024
- Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2021-2024
- Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2021-2024
- Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2021-2024
- Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2024-2029
- Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2024-2029
- Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2024-2029

KEY DATA FINDINGS

2024 DEVELOPMENTS

Strong growth propels ingredient innovation and mind-body positioning
Companies expand scent profiles and capitalise on strong retail partnerships
Bath and shower products for a glowing look and moisturising peak in popularity

PROSPECTS AND OPPORTUNITIES

Bath and shower products emphasise the mind-body connection
Intimate washes enter retail and expand their line-ups
Premium liquid soaps see growth in retail

CATEGORY DATA

- Table 22 - Sales of Bath and Shower by Category: Value 2019-2024
- Table 23 - Sales of Bath and Shower by Category: % Value Growth 2019-2024
- Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2019-2024
- Table 25 - NBO Company Shares of Bath and Shower: % Value 2020-2024
- Table 26 - LBN Brand Shares of Bath and Shower: % Value 2021-2024
- Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2021-2024
- Table 28 - Forecast Sales of Bath and Shower by Category: Value 2024-2029
- Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2024-2029
- Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2024-2029

Colour Cosmetics in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

Lip products retains star growth status again in 2024, but not enough to lift mass colour cosmetics to growth
Outperforming colour cosmetics brands foster consumer engagement and lead with innovative product development
Retail e-commerce continues making gains, while department stores and pharmacies struggle to keep up

PROSPECTS AND OPPORTUNITIES

Cautiously optimistic expectations for colour cosmetics in 2025, as economic uncertainty looms and beauty consumption normalises
Skinification, or innovative efforts to blur the lines between colour cosmetics and skin care, will be a must in the forecast period
Digital avenues will remain important for both shopping and engagement

CATEGORY DATA

- Table 31 - Sales of Colour Cosmetics by Category: Value 2019-2024
- Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2019-2024
- Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2020-2024
- Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2021-2024
- Table 35 - LBN Brand Shares of Eye Make-up: % Value 2021-2024
- Table 36 - LBN Brand Shares of Facial Make-up: % Value 2021-2024
- Table 37 - LBN Brand Shares of Lip Products: % Value 2021-2024
- Table 38 - LBN Brand Shares of Nail Products: % Value 2021-2024
- Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2021-2024
- Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2024-2029
- Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2024-2029

Deodorants in the US

KEY DATA FINDINGS

2024 DEVELOPMENTS

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
Deodorants anticipated to see additional launches from premium fragrance brands
Deodorant layering: The future of personal scent exploration?

CATEGORY DATA

- Table 42 - Sales of Deodorants by Category: Value 2019-2024
- Table 43 - Sales of Deodorants by Category: % Value Growth 2019-2024
- Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2019-2024
- Table 45 - NBO Company Shares of Deodorants: % Value 2020-2024
- Table 46 - LBN Brand Shares of Deodorants: % Value 2021-2024
- Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2021-2024
- Table 48 - Forecast Sales of Deodorants by Category: Value 2024-2029
- Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2024-2029
- Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2024-2029

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
IPL and epilators will continue to drive the shift away from traditional hair removal
Intimate femcare expands interest in gentle hair removal formats

CATEGORY DATA

- Table 51 - Sales of Depilatories by Category: Value 2019-2024
- Table 52 - Sales of Depilatories by Category: % Value Growth 2019-2024
- Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2020-2024
- Table 54 - NBO Company Shares of Depilatories: % Value 2020-2024
- Table 55 - LBN Brand Shares of Depilatories: % Value 2021-2024
- Table 56 - Forecast Sales of Depilatories by Category: Value 2024-2029
- Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2024-2029

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

Table 58 - Sales of Fragrances by Category: Value 2019-2024

Table 59 - Sales of Fragrances by Category: % Value Growth 2019-2024

Table 60 - NBO Company Shares of Fragrances: % Value 2020-2024

Table 61 - LBN Brand Shares of Fragrances: % Value 2021-2024

Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2021-2024

Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2021-2024

Table 64 - Forecast Sales of Fragrances by Category: Value 2024-2029

Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2024-2029

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

Table 66 - Sales of Hair Care by Category: Value 2019-2024

Table 67 - Sales of Hair Care by Category: % Value Growth 2019-2024

Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2019-2024

Table 69 - NBO Company Shares of Hair Care: % Value 2020-2024

Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2020-2024

Table 71 - LBN Brand Shares of Hair Care: % Value 2021-2024

Table 72 - LBN Brand Shares of Colourants: % Value 2021-2024

Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2021-2024

Table 74 - LBN Brand Shares of Styling Agents: % Value 2021-2024

Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2021-2024

Table 76 - Forecast Sales of Hair Care by Category: Value 2024-2029

Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2024-2029

Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2024-2029

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

- Table 79 - Sales of Men's Grooming by Category: Value 2019-2024
- Table 80 - Sales of Men's Grooming by Category: % Value Growth 2019-2024
- Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2021-2024
- Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2021-2024
- Table 83 - NBO Company Shares of Men's Grooming: % Value 2020-2024
- Table 84 - LBN Brand Shares of Men's Grooming: % Value 2021-2024
- Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2021-2024
- Table 86 - Forecast Sales of Men's Grooming by Category: Value 2024-2029
- Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2024-2029

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

- Table 88 - Sales of Oral Care by Category: Value 2019-2024
- Table 89 - Sales of Oral Care by Category: % Value Growth 2019-2024
- Table 90 - Sales of Toothbrushes by Category: Value 2019-2024
- Table 91 - Sales of Toothbrushes by Category: % Value Growth 2019-2024
- Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2020-2024
- Table 93 - NBO Company Shares of Oral Care: % Value 2020-2024
- Table 94 - LBN Brand Shares of Oral Care: % Value 2021-2024
- Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2021-2024
- Table 96 - LBN Brand Shares of Toothpaste: % Value 2021-2024
- Table 97 - Forecast Sales of Oral Care by Category: Value 2024-2029
- Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2024-2029
- Table 99 - Forecast Sales of Toothbrushes by Category: Value 2024-2029
- Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029

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

- Table 101 - Sales of Skin Care by Category: Value 2019-2024
- Table 102 - Sales of Skin Care by Category: % Value Growth 2019-2024
- Table 103 - NBO Company Shares of Skin Care: % Value 2020-2024
- Table 104 - LBN Brand Shares of Skin Care: % Value 2021-2024
- Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2021-2024
- Table 106 - LBN Brand Shares of Anti-agers: % Value 2021-2024
- Table 107 - LBN Brand Shares of Firming Body Care: % Value 2021-2024
- Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2021-2024
- Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2021-2024
- Table 110 - Forecast Sales of Skin Care by Category: Value 2024-2029
- Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2024-2029

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

- Table 112 - Sales of Sun Care by Category: Value 2019-2024
- Table 113 - Sales of Sun Care by Category: % Value Growth 2019-2024
- Table 114 - NBO Company Shares of Sun Care: % Value 2020-2024
- Table 115 - LBN Brand Shares of Sun Care: % Value 2021-2024
- Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2021-2024
- Table 117 - Forecast Sales of Sun Care by Category: Value 2024-2029
- Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2024-2029

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

- Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2019-2024
- Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2019-2024
- Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2020-2024

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2021-2024

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2024-2029

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2024-2029

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

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2019-2024

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2020-2024

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2021-2024

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2024-2029

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beauty-and-personal-care-in-the-us/report.