

# SHAMPOO, CONDITIONER AND HAIRSTYLING PRODUCTS – US – 2024



Brands are increasingly expanding their hair offerings to cater to specific hair types and concerns, aiming to secure a prominent spot in personal care routines.



Carson Kitzmiller, Senior Analyst, Beauty & Personal Care



# Shampoo, Conditioner And Hairstyling Products – US – 2024

## This report looks at the following areas:

- Size and forecast of the shampoo, conditioner and hairstyling product market
- How companies/brands are marketing and messaging products and services to consumers
- How users define their hair through hair porosity, hair texture and hair structure
- Concerns users have with their hair
- Use of shampoo, conditioner, hair treatments and hairstyling products
- Benefits sought from hair cleansers, conditioners, treatments and styling products
- How frequently consumers use various haircare products or styling actions
- Attitudes and behaviors toward hair health, hair loss and hair damage
- Engagement with professional hair services



Brands are increasingly expanding their hair offerings to cater to specific hair types and concerns, aiming to secure a prominent spot in personal care routines.

## Overview

The shampoo, conditioner and hairstyling products (SCH) market saw dollar growth across each segment in 2023, thanks to the essential nature of most sub-categories, an elevated focus on healthy hair/scalp and the continued "skinification" of the category, as key demographics dive into multistep routines similar to that of the skincare category. Most are using traditional shampoo and conditioners, with consumers looking for solution-focused benefits for their key hair concerns across all steps within hair routines. Personalization desires continue in haircare as adults seek "designed for me" products across all subsegments, and

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brands are catering to diverse needs with segmented collections for niche demographics. Hair loss and dryness remain key concerns universally no matter the age, but embracing the complexities of concerns in tandem with hair porosity, texture and structure will become the expectation as brands look to gain long-term loyalty within this highly competitive market. While scalp-specific treatment products are not seeing widespread usage across the population, interest in scalp support is there as many look to functional formats like shampoos and professional and support through stylists to cultivate better hair and scalp health, a trend stemming from the skincare space.

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# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

## THE MARKET

### Market context

- Annual inflation unexpectedly rose in December, but still sits at its lowest levels in over two years
  - Graph 1: headline CPI, core CPI, and shelter CPI, 2021-23
- Unemployment continues to sit near historic lows
  - Graph 2: unemployment rate, 2019-23
- Consumer confidence is at its highest point in over two years
  - Graph 3: consumer sentiment index, 2021-24

### Market drivers

- Masstige and prestige haircare increases presence on shelves
  - Graph 4: haircare (shampoo, conditioner, hair styling, hair treatments) launches, by select beauty price positioning, 2018-23
- Haircare (shampoo, conditioner, hair styling, hair treatments) launches, by select beauty price positioning, US, 2018-23
- However, "value" stores entice users with comparable solutions
- Beauty price positioning and claims associated within shampoo, conditioner, hair treatments and hairstyling products, US
- Key demographic targets are using 8+ types of products
  - Graph 5: Shampoo, Conditioner, Treatments and Hairstyling product usage, repertoire, 2023

### Market size and forecast

- Haircare continues to climb, but expected to cool beyond 2024
- The MULO haircare market expected to surpass \$11 billion in 2024
- Even amongst inflation, the category sees a lift

### Market segmentation

- Lather, ritualize, repeat: daily rhythms are boosting shampoo sales
  - Graph 6: total retail sales and forecast of shampoo, conditioner and hairstyling products, by segment, at current prices, 2018-28
- After big gains in 2023, all segments expected to see continued growth in 2024

## Market share/brand share

- Top companies see topline dollar sales growth in 2023
- P&G remains dominant across its shampoo brands
- Mielle acquisition and Native haircare launches bring success to P&G's conditioner segment
- TRESemmé drives Unilever's hairstyling segment performance

## COMPETITIVE STRATEGIES & MARKET OPPORTUNITIES

### "Skinification" of haircare continues

- The "skinification" of hair continues through active ingredient-led formulations
- The Ordinary brings an ingredient-first approach to haircare
- Hyaluronic acid inclusions sees growth globally in haircare
  - Graph 7: hyaluronic acid inclusion within haircare, by sub-category, 2016-23
- Take a page from skincare and cosmetic formats to entice haircare use
- Shower routines: go beyond functionality to support total wellbeing
- Self-care reflected through ingredients and fragrance
- Appeal to consumer interest in bond-repair technology
- NPD aims to level up "for damaged hair" claims with bond-repair technology

### Personalized routines and products infiltrate the market

- Consumers are becoming increasingly educated on their unique hair needs
- Personalization goes beyond traditional DTC models
- Lack of support for aging hair apparent
  - Graph 8: select attitudes toward the beauty industry, by gender and age, 2023
- Personalization extends to brushes, hair ties and styling tools

### New avenues of influence

- Dermatologists influence hair health on TikTok
- K18 uses employees to authentically market efficacy
- NIL regulations open the doors for sponsorships in college sports

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#### Hair types: structure, texture and porosity

- Most know their "top-level" hair texture, but recommendations can get far more personalized
  - Graph 9: self-described natural hair texture, 2023
  - Graph 10: self-described natural hair texture, by select race, 2023

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- Facilitate improved education for BPC brands and stylists around coily/curlly hair specifics for people of color
- Hair structure nuances apparent across all hair textures
  - Graph 11: self-described natural hair structure, 2023
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## Treatment and styling usage details and benefits sought

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- Styling and treatments will likely fuse to capture customers

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- Graph 26: hair treatment and hair styling product usage, by gender, 2023
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