

Nail Care Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Nail Polish, Nail Accessories, Nail Strengthener, Nail Polish Remover, Artificial Nails and Accessories, Others), By Distribution Channel Offline (Hypermarkets/Supermarkets, Retail Stores, Beauty Salon, Others), Online), By Region & Competition, 2021-2031F

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Abstracts

The Global Nail Care Market is projected to expand from USD 26.67 Billion in 2025 to USD 36.11 Billion by 2031, reflecting a CAGR of 5.18%. This sector comprises a wide variety of items designed for the maintenance, treatment, and enhancement of fingernails and toenails, ranging from polishes and strengtheners to removers and artificial extensions. Growth is largely fueled by a heightened consumer focus on personal grooming, alongside the pervasive impact of social media platforms that frame elaborate nail art as a key mode of self-expression. Additionally, the increasing availability of professional-grade tools for home use ensures continued demand across both the retail and professional service landscapes.

Despite this positive outlook, the market encounters significant obstacles due to intense scrutiny regarding chemical ingredients such as formaldehyde and toluene, which provokes safety anxieties among regulators and educated consumers alike. This pressure mandates expensive product reformulations and rigorous adherence to changing safety norms. According to Cosmetics Europe, the decorative cosmetics category, which encompasses nail care, achieved retail sales of 13.9 billion euros in Europe during 2024, marking an 8.2 percent annual rise. These figures underscore the

sector's enduring economic significance even as it adjusts to elevated standards for ingredient safety and transparency.

Market Driver

Celebrity endorsements and social media dynamics have revolutionized how consumers interact with the nail care industry, elevating manicure aesthetics to the status of viral cultural phenomena. Platforms such as TikTok and Instagram hasten the trend cycle, forcing brands to innovate quickly with tools and polishes that enable complex, camera-ready styles. This digital environment fuels demand for niche artistic looks, often triggering immediate surges in search traffic and purchases. For instance, Scratch Magazine noted in its August 2024 'Autumn 2024 Trend Report,' based on Pinterest data, that searches for "bow nail designs" skyrocketed by 2,200 percent, demonstrating how platform-driven visuals shape specific consumer desires and compel manufacturers to align launches with real-time digital trends.

Concurrently, the growth of professional nail salons and spa services continues to be a vital driver of market value, providing specialized treatments that surpass at-home capabilities. Although the DIY sector is strong, the professional service industry has demonstrated resilience by upgrading customer experiences and premiumizing service offerings to navigate economic headwinds. According to the National Hair & Beauty Federation's 'State of the Industry Survey' from May 2024, 45 percent of beauty businesses reported profitability, indicating a steady recovery in the sector despite operational hurdles. This momentum is further corroborated by major industry players; Coty Inc.'s 'Fiscal Year 2024 Results' from August 2024 revealed that its Consumer Beauty segment achieved a like-for-like revenue growth of 6 percent, confirming sustained financial strength across the wider cosmetic landscape.

Market Challenge

The intense examination of chemical ingredients, specifically concerning compounds like formaldehyde and toluene, poses a major hurdle to the Global Nail Care Market's expansion. This heightened emphasis on safety forces manufacturers to reallocate significant capital and technical expertise toward complex reformulation efforts, often at the expense of product innovation or market growth. As regulators implement tighter safety measures, companies must navigate a disjointed compliance environment where standards differ greatly by region. This often necessitates creating separate inventory stock units for various jurisdictions, which disrupts supply chain efficiency, raises the unit cost of goods sold, and ultimately compresses profit margins while retarding

distribution speeds.

Moreover, the difficulty of meeting evolving international safety benchmarks directly restricts cross-border commerce, hindering brands' abilities to scale globally. The administrative strain of verifying compliance creates barriers that discourage exporting to regions with conflicting chemical regulations. According to the British Beauty Council, exports by UK beauty and personal care manufacturers totaled ?4.3 billion in 2024, representing a continued annual decrease of 5.9 percent since 2020, primarily due to shifting trade rules and increased bureaucratic red tape. This reduction in trade volume demonstrates how the financial and logistical demands of adhering to strict ingredient standards effectively impede the sector's broader economic development.

Market Trends

The premiumization of reusable press-on and soft gel systems marks a pivotal market shift, elevating the category from temporary emergency fixes to high-quality, salon-grade solutions. Manufacturers are increasingly employing advanced materials that replicate the durability and appearance of professional gel manicures, satisfying consumer desires for affordable luxury. This improvement in quality has successfully retained customers who entered the market during the pandemic, converting them into consistent users of modular nail systems. The segment's financial strength validates this transition; as reported by Retail Dive in a November 2024 article titled 'Olive & June to be acquired,' the specialized brand Olive & June was projected to reach approximately \$92 million in net sales revenue for 2024, underscoring the substantial scale and potential of the premium at-home category.

At the same time, the proliferation of textured and haptic nail art finishes is reshaping aesthetic norms, with consumers gravitating toward multi-dimensional designs that offer visual and tactile complexity. This trend moves beyond simple color application to include metallic foils, 3D gemstones, and raised structures, effectively turning nails into sculptural accessories. Brands are reacting by introducing specialized toolkits and viscous gel formulas designed to secure intricate, heavy embellishments, catering to users aiming to recreate elaborate digital looks physically. This demand for opulent styling is reflected in search data; according to NewBeauty's August 2024 report, 'Pinterest Predicts These Will Be The Biggest Trends of Fall 2024,' interest in "Greek goddess nails"—a style featuring gold leaf and 3D details—surged by 1,975 percent, highlighting a strong market pivot toward highly ornamental finishes.

Key Market Players

L'Oreal S.A.

Coty Inc.

The Estee Lauder Companies Inc.

Shiseido Company, Limited

Unilever

Revlon, Inc.

OPI Products

Essie Cosmetics

Sally Hansen

Creative Nail Design

Report Scope

In this report, the Global Nail Care Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Nail Care Market, By Product Type

Nail Polish

Nail Accessories

Nail Strengthener

Nail Polish Remover

Artificial Nails and Accessories

Others

Nail Care Market, By Distribution Channel Offline

Hypermarkets/Supermarkets

Retail Stores

Beauty Salon

Others

Nail Care Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Nail Care Market.

Available Customizations:

Global Nail Care Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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