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info@marketpublishers.com

Keratin Products Market – Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Form (Liquid, Powder, Tablet), By Application (Cosmetic & Personal Care Products, Pharmaceuticals Products, Others), By End User (Professional Salons, Home Use, Others), By Region & Competition, 2021-2031F

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Abstracts

The global keratin products market is forecast to grow from USD 1.77 Billion in 2025 to USD 2.77 Billion by 2031, at a CAGR of 7.75%. These products are specialized hair care formulations containing fibrous structural proteins aimed at smoothing the hair cuticle, eliminating frizz, and strengthening hair fibers against chemical or environmental damage. Primary market drivers include the escalating global demand for professional-grade personal grooming and a heightened consumer willingness to invest in premium restorative treatments. Additionally, the increasing prevalence of hair damage from pollution and frequent styling necessitates the use of such protein-enriched solutions, with the robust European hair care category's retail sales of €18.1 billion in 2024 demonstrating the supportive economic environment for specialized treatment products. A significant challenge that could impede this market's expansion is the rigorous regulatory scrutiny surrounding formaldehyde and its releasers, chemicals historically linked with effective keratin treatments. Strict safety standards in major economic regions are compelling manufacturers to reformulate products with alternative ingredients, which often results in higher production costs and varied efficacy levels. These regulatory pressures, combined with the subsequent need for extensive consumer education on product safety, create a barrier that may slow the adoption of these products in strictly regulated markets.

Market Driver

The growth of the professional salon and beauty clinic sector is a primary catalyst for the global keratin products market, given that these intricate protein treatments are largely applied by trained stylists to guarantee safety and optimal results. The resurgence of in-salon services has significantly boosted the consumption of high-concentration keratin formulations, which are crucial for achieving long-lasting hair smoothing and effective fiber restructuring. This reliance on expert application is underscored by the financial performance of leading industry suppliers to this channel. For example, L'Or?al's '2024 Annual Results' reported a 5.3% like-for-like sales growth in its Professional Products Division, demonstrating the sustained expansion of this beauty channel despite economic headwinds. Concurrently, increasing consumer demand for premium and specialized hair care is transforming market dynamics, as users increasingly seek scientifically validated solutions for hair damage and repair. This trend, termed the "skinification" of hair care, sees consumers opting for advanced ingredients like hydrolyzed keratin to counter chemical and environmental damage. The shift towards high-performance, value-added products is confirmed by recent data, such as Henkel's 'Annual Report 2024', which noted a 3.0% organic sales growth in its Consumer Brands' Hair business, and the CTPA's report on Great Britain's haircare sector, showing a 4.6% value growth in 2024, reinforcing the specialized hair category's resilience.

Market Challenge

The global keratin products market faces a significant challenge from rigorous regulatory scrutiny concerning formaldehyde and its releasers. As major economic regions implement strict safety standards to mitigate health risks linked to these chemical agents, manufacturers are obliged to reformulate their primary product lines. This reformulation requires replacing established formaldehyde-based compounds with alternative ingredients, frequently resulting in increased raw material costs and inconsistent smoothing efficacy. Consequently, the industry grapples with a dual burden: substantial capital investment redirected towards research and compliance efforts, alongside a potential decline in consumer confidence due to perceived variability in treatment performance compared to traditional formulations. The extent of this regulatory pressure is highlighted by the rising number of product safety notifications, with cosmetics accounting for 36% of all safety alerts in the European Union's rapid alert system in 2024, primarily due to chemical compliance issues, as reported by the CTPA. This intensified oversight creates an unstable operational environment, forcing manufacturers to navigate intricate and fragmented legal frameworks. The ensuing uncertainty not only delays new product introductions but also restricts market access, thereby forming a barrier that decelerates the adoption of professional keratin treatments in jurisdictions with strict regulations.

Market Trends

The rapid increase in vegan and plant-derived keratin alternatives is fundamentally changing product formulations, as consumers increasingly base their hair care decisions on ethical considerations. This trend extends beyond mere regulatory compliance, fostering the adoption of phyto-keratin complexes derived from sources like wheat, soy, and corn, which emulate the amino acid profile of animal proteins without ethical concerns. Manufacturers are actively leveraging this clean beauty momentum by certifying products to substantiate their plant-based claims, thereby appealing to a growing segment of eco-conscious consumers. The commercial success of this category is demonstrated by strong sectoral performance. For instance, the Soil Association Certification's 'Organic Market Report 2025' noted an 11% growth in sales of organic beauty and wellbeing products in 2024, reflecting a strong consumer preference for certified natural formulations over traditional animal-based ingredients. Concurrently, a surge in at-home salon-grade keratin treatment kits is disrupting the traditional exclusivity of the professional channel. Motivated by desires for cost-effective maintenance and convenience, consumers are increasingly turning to retail-available bond-building systems that provide professional-level structural repair without salon visits. This democratization of highly effective treatments enables users to independently maintain smooth, frizz-free hair, thus challenging the revenue stronghold of professional service providers. This shift in channels is evident in the differing performance of major bond-building brands; Olaplex Holdings, Inc.'s 'Fourth Quarter and Fiscal Year 2024 Results' reported a 5.4% increase in net sales within the Specialty Retail channel for the fiscal year, confirming the rising market demand for premium, self-applied hair reconstruction solutions.

Key Market Players

Loreal S.A.

Rejuvenol LLC

Scherdiva Salon LLC

Keratine Professional Pvt Ltd.

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Guangzhou Me2 Hair Products Co., Ltd.

Zoic Pharmaceuticals Pvt. Ltd

Vaibhav Perfumery

Glamcos Lifestyle Private Limited

HCP Wellness Private Limited

Kazima Perfumers

Report Scope

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

Keratin Products Market, By Form

Liquid

Powder

Tablet

Keratin Products Market, By Application

Cosmetic & Personal Care Products

Pharmaceuticals Products

Others

Keratin Products Market, By End User

Professional Salons

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Home Use

Others

Keratin Products 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 Keratin Products Market.

Available Customizations:

Global Keratin Products 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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