

North America Lipstick Market, By Distribution Channel (Departmental/ Grocery Stores, Multi Branded Retail Stores, Online, Supermarkets/Hypermarkets, Exclusive Retail Stores, Others), By Product Type (Gloss, Matte, Others), By Country, Competition Forecast & Opportunities, 2020-2030F

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Abstracts

The North American lipstick market was valued at USD 4,628.12 million in 2024 and is projected to reach USD 5,788.80 million by 2030, growing at a CAGR of 3.8% during the forecast period. This market is experiencing significant growth, driven by changing consumer preferences, rising demand for premium and organic lip products, and the increasing influence of social media and beauty influencers. The market is segmented by distribution channel into departmental/grocery stores, multi-branded retail outlets, online platforms, supermarkets/hypermarkets, exclusive retail stores, and other channels. The online segment is growing rapidly due to the convenience of e-commerce, while supermarkets/hypermarkets and exclusive retail stores continue to dominate due to in-store trials and strong brand loyalty.

By product type, the market is categorized into gloss, matte, and other variants. Matte lipsticks lead the market due to their long-lasting, transfer-resistant qualities, while gloss lipsticks are gaining popularity with the resurgence of dewy, hydrating formulations. Key drivers of growth include rising disposable incomes, growing awareness of personal grooming, and continuous innovation in product formulations, including clean beauty and vegan-friendly options. The influence of celebrity endorsements, digital marketing campaigns, and seasonal product launches also fuels market expansion. The presence of leading beauty brands, along with the growing popularity of indie cosmetics, further intensifies competitive dynamics. Additionally, the demand for sustainable, eco-friendly

packaging is reshaping product offerings, prompting brands to invest in recyclable materials.

While the U.S. remains the largest market due to a high concentration of beauty-conscious consumers, Canada is witnessing steady growth driven by increasing urbanization and beauty trends. However, challenges such as fluctuating raw material costs, intense brand competition, and regulatory constraints related to product formulations and labeling could impact market progression. Despite these challenges, the North American lipstick market is well-positioned for sustained growth, with continuous product innovation and strategic expansion through omnichannel retailing, catering to a diverse consumer base with varying preferences and affordability levels.

Market Drivers: Evolving Consumer Preferences and the Rise of Clean Beauty Trends

One of the most significant drivers of the North American lipstick market is the shift in consumer preferences toward clean, sustainable, and high-performance beauty products. Consumers are increasingly seeking lipsticks that not only offer vibrant, long-lasting color but also exclude harmful chemicals such as parabens, sulfates, and synthetic fragrances. The demand for organic, cruelty-free, and vegan lip products has surged, prompting major beauty brands and independent companies to develop eco-friendly formulations. Additionally, heightened awareness of the harmful effects of ingredients like lead and artificial dyes has led to a growing preference for natural alternatives enriched with nourishing ingredients like shea butter, coconut oil, and vitamin E.

The clean beauty movement has gained significant traction, fueled by social media influencers, dermatologists, and beauty bloggers who promote ingredient transparency and plant-based cosmetics. Regulatory bodies, such as the U.S. Food and Drug Administration (FDA) and the Environmental Working Group (EWG), are also pushing for safer formulations, further encouraging brands to focus on transparency and sustainability in their product offerings. This shift toward clean beauty has become a critical market growth driver, as consumers are increasingly willing to pay a premium for high-quality, ethical, and skin-friendly lipsticks.

Key Market Challenges: Stringent Regulatory Compliance and Ingredient Restrictions

A major challenge facing lipstick manufacturers in North America is adhering to stringent regulatory standards and ingredient restrictions. Regulatory bodies such as the U.S. FDA, Health Canada, and the EWG impose rigorous guidelines on cosmetic

formulations, labeling, and safety testing. Increasing scrutiny over harmful ingredients such as lead, parabens, phthalates, and artificial colorants has forced brands to reformulate their products to meet evolving safety requirements. As consumer demand for clean beauty grows, companies must invest in research and development (R&D) to create natural and organic alternatives that do not compromise product performance.

Furthermore, companies looking to enter international markets face additional regulatory hurdles, as ingredient approvals and safety testing requirements vary across countries. For instance, certain preservatives and pigments approved in the U.S. may be restricted or banned in European or Asian markets. These regulatory complexities add operational costs, delay product launches, and require continuous monitoring to ensure compliance with evolving cosmetic laws. As governments push for greater transparency in labeling and sustainability, brands must invest in compliant formulations and ethical sourcing, which further increases costs and operational efforts.

Key Market Trends: Rise of Hybrid Lipstick Products

A notable trend in the North American lipstick market is the growing demand for hybrid lip products that combine makeup and skincare benefits. Today's consumers are increasingly looking for multifunctional beauty solutions that not only offer color and aesthetics but also nourish and protect the lips. In response, brands are introducing lipsticks infused with skincare ingredients such as hyaluronic acid for hydration, vitamin E and C for antioxidant protection, collagen and peptides for anti-aging and plumping effects, and SPF for sun protection.

This trend has gained traction amid growing awareness of lip health, with consumers seeking formulations free from drying agents and harsh chemicals. Products like tinted lip balms, lip oils, and serum-infused lipsticks are becoming popular, particularly among consumers who prioritize both function and aesthetics. Additionally, the "skin-first" beauty movement, which emphasizes skincare over heavy makeup, has led to a shift toward natural, lightweight lip formulations that enhance, rather than mask, natural beauty. As a result, brands are focusing on developing lipsticks with hydrating, anti-aging, and repairing properties to meet these evolving demands.

Key Market Players

Parfums Christian Dior Soci?t? Anonyme

CHANEL Limited

Revlon Consumer Products Corporation

The Estée Lauder Companies Inc.

L'Oréal S.A.

Shiseido Company, Limited

Coty Inc.

Beiersdorf Aktiengesellschaft

Unilever PLC

The Procter & Gamble Company

Report Scope:

This report segments the North American lipstick market as follows, with detailed insights into industry trends:

By Distribution Channel:

Departmental/Grocery Stores

Multi-Branded Retail Stores

Online Platforms

Supermarkets/Hypermarkets

Exclusive Retail Stores

Others

By Product Type:

Gloss

Matte

Other Variants

By Country:

United States

Canada

Mexico

Rest of North America

Competitive Landscape & Company Profiles:

A detailed analysis of the leading companies in the North American lipstick market is provided.

Available Customizations:

TechSci Research offers tailored reports based on specific company needs. Customizations include detailed analyses and profiles of additional market players (up to five).

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